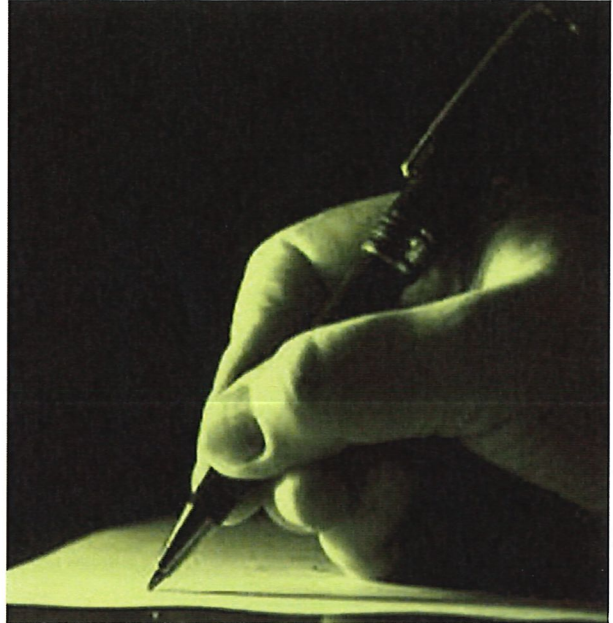




Community  
Foundation of  
Wabash County

*We're here for giving. We're here for good.*



## PROPOSAL

### *Fiscal Sponsorship*

*The Community Foundation of Wabash County will, from time to time, determine that financial support of a charitable event, program, or project (Project) of another person or Foundation will further the tax-exempt purpose of the Foundation. This determination is made after receipt and consideration of this grant proposal. As such, the relationship between the Foundation and the Project is that of grantor-grantee. The Foundation (grantor) serves only as fiscal sponsor for the Community Group (grantee). A fiscal sponsorship arrangement is created when a Project of a person or group wants to receive support from one or more funding sources – a private foundation(s), a government agency, tax-deductible donations from individuals or corporate donors – that, by law, policy, or preference, will only make payments to organizations with 501(c)(3) tax-exempt status.*



## Proposal: *Fiscal Sponsorship*

### Administrative Steps

*The administrative steps necessary to complete a fiscal sponsorship are described here. This grant proposal document is the first of two documents. If this grant proposal is approved, both parties will subsequently execute a grant agreement.*

|  |  |
|--|--|
| <p><b>Step 1</b><br/><b>GRANT PROPOSAL</b></p>   | <p>The person or entity that wants to do the event, program, or project (Project) completes this written grant proposal and submits it to the Community Foundation of Wabash County (Foundation) for its consideration. The grant proposal must specifically describe the Project to be conducted and substantiate its charitable objective(s).</p>  |
| <p><b>Step 2</b><br/><b>EVALUATION</b></p>   | <p>The Foundation will evaluate this grant proposal to determine whether the Project is, in fact, charitable and furthers the Foundation's tax-exempt purposes.</p>  |
| <p><b>Step 3</b><br/><b>RESOLUTION</b></p>   | <p>The Foundation's staff reviews and if appropriate, recommends to the Board of Directors approval of the Project as furthering its exempt purposes. The Foundation states its conclusions and approves a grant to the Project, to be funded to a certain amount (reflective of the submitted Project budget), and only to the extent that the Foundation receives outside funds for the Project.</p>   |
| <p><b>Step 4</b><br/><b>FISCAL SPONSORSHIP GRANT AGREEMENT</b><br/><i>(executed between parties)</i></p> | <p>The Foundation and the Community Group execute a fiscal sponsorship agreement detailing all terms and conditions that apply to the Project's use of the grant and relations with funding sources. This will include any specific work to be performed by the Project using grant funds. For the time frame as indicated below, the Foundation serves only as the fiscal sponsor of the Project.</p>   |
| <p><b>Step 5</b><br/><b>FUNDRAISING</b></p>  | <p>It is the sole responsibility of the Community Group to solicit and secure funds for the specific grant to be made by the Foundation to the Project. The Foundation does not actively solicit funds; however, the Foundation does make this option available on its website (which could include a separate page). The Foundation shall approve all marketing and solicitation materials and press releases prior to their distribution. The Foundation may consider direct solicitations depending on the Project. Checks should be made payable to the Community Foundation of Wabash County; and the name of the Project/Fund should be on the memo line. The Foundation may also consider initiating a press release for publicity.</p> |
| <p><b>Step 6</b><br/><b>RECOGNITION</b></p>  | <p>The Grantee shall recognize the Foundation in all press releases, publicity, and solicitations, which shall be reviewed by the Foundation prior to release or distribution.</p>   |
| <p><b>Step 7</b><br/><b>DISBURSEMENTS</b></p>  | <p>All contributions and grants received by the Foundation for the Project are segregated to a restricted fund for the Project and then disbursed as a grant (or grants) to the person or organization conducting or providing assistance for the Project, subject to the terms of the agreement.</p>  |
| <p><b>Step 8</b><br/><b>REPORTS</b></p>  | <p>The Project may be required to submit periodic written reports to the Foundation, in accordance with the grant agreement, showing its actual expenditures of grant funds and its progress toward accomplishing the purposes of the grant.</p>   |

## I. Project and Grantee Name

*What is the name of the Grantee that 'owns' the Project, is responsible for its execution and completion, and is submitting this grant proposal?*

Project Name:

Grantee Name:

## II. Grantee Classification

*What is the classification of the Grantee that 'owns' the Project, is responsible for its execution and completion, and is submitting this grant proposal?*

- Individual
- Sole Proprietor
- Tax-exempt entity [501(c)(3)]
- Tax-exempt entity [other than 501(c)(3)]
- Partnership
- Business Corporation
- Other:

## III. EIN or SSN

*What is the Federal Employer Identification Number (EIN) or Social Security Number of the aforementioned Grantee?*

- EIN:
- SSN:

## IV. Documentation

*Please provide the Foundation with one or more of the following to verify classification. Please attach to this grant proposal.*

- IRS Form W-9
- Letter of Determination (tax-exempt status)
- Receipt of taxpayer identification number from IRS
- Form SS-4
- Governing documents
- Other: *(Provide name of documents attached)*

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## V. Representative Profile

*If Grantee is a tax-exempt entity, partnership, or business corporation, or non-profit organization, please provide board resolution, meeting minutes, or corporate resolution that gives representatives listed here authority to submit this grant proposal and, subsequently, to execute the Fiscal Sponsorship Agreement.*

*For non tax-exempt entities, please submit minutes to meetings, organization chart, volunteer job and committee descriptions.*

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### Representative 1

|                            |
|----------------------------|
| Name:                      |
| Title:                     |
| Project's role/authority:  |
| Preferred Mailing Address: |
| Preferred Phone Number:    |
| Preferred Email Address:   |

### Representative 2

|                            |
|----------------------------|
| Name:                      |
| Title:                     |
| Project's role/authority:  |
| Preferred Mailing Address: |
| Preferred Phone Number:    |
| Preferred Email Address:   |

### Representative 3

|                            |
|----------------------------|
| Name:                      |
| Title:                     |
| Project's role/authority:  |
| Preferred Mailing Address: |
| Preferred Phone Number:    |
| Preferred Email Address:   |

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## VI. Time Frame

*What is the time-frame of this project? What is the start date and end date?*

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Start Date: \_\_\_\_\_ End Date: \_\_\_\_\_ Time Frame: \_\_\_\_\_

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Additional Comments:

## VII. Project Description

*IMPORTANT: The Community Foundation of Wabash County will only consider this grant proposal if it is concluded that the Project, in fact, furthers the tax-exempt purposes of the Foundation.*

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**Please provide clear and concise answers/explanations to the following:**

7A. Describe and explain this Project. Include who the project benefits, describe the need it addresses.

7B. How is this Project charitable and/or philanthropic? Describe the Philanthropic or charitable benefit.

7C. Describe your fund raising plans related to gift solicitations. Identify responsible parties. Please provide a time line. Please attach publicity materials.

7D. Do you plan fundraising activities, such as events, auctions, outings, bake sales etc.? Please describe. Identify responsible parties, time line and attach materials.

7E. Will funds raised be used for fund-raising purposes? Describe.

7F. Will there be any individuals reimbursed by the Project? If so, explain. Who may be purchasing goods or services which will require reimbursement?

**VIII. Expected Vendors/Suppliers**

Please list vendor name(s) and service(s).

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**IX. Insurance(s)**

*The Foundation will require that the Project carry adequate liability insurance, and other insurance, if necessary. The Foundation will require that it be named as an additional insured on said policy(ies). The Project will have to provide proof of the insurance coverage for the duration of the Project.*

**X. Budget: Project Receipts & Grants**

*Please state here the grant proposal amount requested for this Project and provide a budget that substantiates this. (Project budget can be modified.)*

Grant proposal amount(s):

*Estimate here the amount you expect to contribute and grant from the fund.* \_\_\_\_\_

**XI. Contributions**

*The Community Foundation of Wabash County can receive tax-deductible contributions from a variety of sources in order to make grants per this proposal. Said contributions will be segregated to a restricted fund for purposes of this Project. The Foundation will have complete discretion and control over the funds. The Foundation will fund the Project only to the extent that sufficient contributions are received from donors, and after proper approval of grant recommendations.*

**Please identify the expected source(s) of gifts to the Foundation for this grant proposal.**

- Individual contributions
- Corporate contributions
- Private foundation grants
- Fundraising
- Other:

**XII. Applying for External Grants**

*The Grantee may be interested in applying for grants from various sources for the Project. As such, this is solely the responsibility of the Grantee and not that of the Foundation. Further, the Grantee may desire that such grants be made directly to the Foundation and naming the Foundation as the direct recipient. The Foundation will consider special arrangements on a case by case basis. Reporting requirements and other responsibilities surrounding such grants may require an additional grant.*

### XIII. Number of Contributions

Please estimate the number of actual contributions the Foundation can expect to receive for this Project (by range). (Checks should be made payable to the Community Foundation of Wabash County; name of the Project/Fund should be on the memo line.)

1 to 25       26 – 50       51 - 75       76 - 100       more than 100

Comments:

### XIV. Number of Disbursements

Please estimate the number of actual disbursements (grants) the Foundation can expect to make for this project (by range).

1 to 10       11 - 25       more than 25

### XVI. Type(s) and Frequency of

Any individual or organization receiving any grant disbursement will be required to provide a W-9 and will receive an IRS Form 1099 at year-end.

Types of disbursements can expect to make for this Project:

Salary, taxes, and/or employee benefits for \_\_\_\_\_ person(s).

Invoices

Other:

Frequency of expected disbursements:

weekly       bi-weekly       monthly       other:

### XVII. Administrative Fee

The Foundation is responsible for all administrative aspects of the fund associated with this Project, including grants verification and contribution processing, generation of fund statements, annual audit, filing annual IRS Form 990 and other philanthropic services. Our Administrative Fee is very competitive with commercial gift funds and private foundations.

The Foundation requires a minimum administrative fee of \$100 for a fiscal sponsorship. The actual fee will be the greater of the minimum administrative fee and 2% of all contributions (gifts, grants, donations, etc.) it receives for the Project. **HOWEVER**, the Foundation can consider a 'cap' on its Administrative Fee, depending on answers to the aforementioned 'Number of Contributions,' 'Number of Disbursements,' and 'Type(s) and Frequency of Disbursements' sections.



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## XVIII. Addendum(s)

Please indicate addendums attached to this proposal, if any.

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- Documentation verifying separate legal entity status

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  - Copy of board or corporate resolution, board or committee minutes signed by the members, giving representative authority to submit grant proposal

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  - Proposed Project budget

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  - Names of individuals or groups involved

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  - Other:

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## XIX. Signature

*Our organization acknowledges that appropriate personnel have read and understand this letter, that its term and conditions are acceptable to us, and that we will comply with those terms and conditions.*

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### REPRESENTATIVE

---

SIGNATURE

---

NAME (PRINT)

---

TITLE

---

DATE

### REPRESENTATIVE

---

SIGNATURE

---

NAME (PRINT)

---

TITLE

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DATE

**FOR FOUNDATION USE ONLY.**

*This grant proposal is:*

Approved      Date:

Not Approved      Date:

Comments: