



SAMPLE

Fiscal Sponsorship Renewal Application

Stumptown Neighborhood Association (Grantee) wishes to renew, terminate and/or add the projects listed below for fiscal sponsorship with SE Uplift Neighborhood Coalition.

We have reviewed the information provided in the Handbook and the attached application was approved by a vote of our board/leadership on (date): 3/15/17

List all projects being renewed, terminated or added for fiscal sponsorship

Status (Select one for each project)

1	SNA General Account	Renew	Terminate	Add
2	SNA National Night Out	Renew	Terminate	Add
3	SNA Mural	Renew	Terminate	Add
4	SNA Spring Seed Swap Party	Renew	Terminate	Add
5	SNA Resilience/E-prep Project	Renew	Terminate	Add
6		Renew	Terminate	Add

Completion Checklist

Use this list to make sure your application is complete.

For each project we are *renewing*, we have:

- Included the information about each project on the following **Project Summary** page
- Attached an **Expense Worksheet** showing anticipated expenses for each project
- Attached an **Annual Report** describing last year’s activities for each project

For the projects being *terminated*, we have:

- Attached an **Annual Report** describing last year’s activities for each project
- Attached a plan for any remaining funds held with SE Uplift for each project being terminated.
Note: Prior to your board’s vote, please confirm that your plan for using/transferring any remaining funds is acceptable by first checking in with SE Uplift staff.

For *new* projects, we have:

- Included information about each project on the following Project Summary page
- Attached an **Expense Worksheet** for each new project, showing anticipated expenses

Primary Contact Name: _____ Email: _____

PROJECT SUMMARY PAGE

Applicant Organization: Stumptown Neighborhood Association Date: 3/15/17

Instructions

Please list each project for which your organization would like to receive fiscal sponsorship in the coming year. Add lines for events/activities as needed or complete on a separate page.

Project/Event/Activity 1: SNA General Account

Please describe the project. Tell us how this project will serve the mission of your organization.

We will use this fund to raise money for general neighborhood association activities and functions related to our mission.

Types of fundraising efforts (seeking in-kind donations like refreshments, soliciting financial donations from neighbors, applying for grants, etc.):

Fred Meyer Community Rewards funds, general fundraising from neighbors and area businesses; in-kind food donations

Date for event/project culmination and anticipated months of fundraising activity: Ongoing

Project coordinator: Sal Goode

Phone: ###-###-####

Email: sal@stumptownna.com

Project/Event/Activity 2: SNA National Night Out

Please describe of how this project will benefit and serve the mission of your organization.

National Night Out brings neighbors together to build community, increase safety, and increases the visibility of the neighborhood association

Types of fundraising efforts (seeking in-kind donations like refreshments, soliciting financial donations from neighbors, applying for grants, etc.):

In-kind donations for refreshments/party supplies, soliciting financial donations from local developers and businesses

Date for event/project culmination and anticipated months of fundraising activity: August 2017

Project coordinator: Cindy Pertipan

Phone: ###-###-####

Email: cindy@pertipan.com

Project/Event/Activity 3: SNA Mural

Please describe of how this project will benefit and serve the mission of your organization.

We are building relationships between neighbors, businesses and also area families with children through the development of a mural. We will host open houses to get feedback and ideas for mural design, and after we finish painting, we will have a community event to celebrate.

Types of fundraising efforts (seeking in-kind donations like refreshments, soliciting financial donations from neighbors, applying for grants, etc.):

Seeking in-kind donations for paint, supplies, event refreshments, as well as volunteer hours painting/organizing. Also seeking cash donations from area businesses and neighbors. Applying for a Regional Arts and Culture Grant to cover costs in June.

Date for event/project culmination and anticipated months of fundraising activity: July 2017

Project coordinator: Sal Goode
Phone: ###-###-#### Email: sal@stumptownna.com

Project/Event/Activity 4: SNA Spring Seed Swap Party

Please describe of how this project will benefit and serve the mission of your organization.

The volunteer who hosted this party is moving out of town and someone from the Stumptown Business Association is going to start hosting it instead. We propose donating the remaining funds in our account to the SBA (a 501 c3 non-profit) to use for this year's spring party. We've included more information in an annual report.

Types of fundraising efforts (seeking in-kind donations like refreshments, soliciting financial donations from neighbors, applying for grants, etc.):

n/a

Date for event/project culmination and anticipated months of fundraising activity: Transfer funds in April

Project coordinator: n/a Contact our Treasurer to discuss feasibility and transfer details

Phone: ###-###-#### Email: _____

Project/Event/Activity 5: Resilient Stumptown NA

Please describe of how this project will benefit and serve the mission of your organization.

Volunteers will build neighborhood resilience through relationship-building and skills trainings re: earthquake preparedness efforts

Types of fundraising efforts (seeking in-kind donations like refreshments, soliciting financial donations from neighbors, applying for grants, etc.):

In kind donations for meeting refreshments and e-prep items for raffles.

Date for event/project culmination and anticipated months of fundraising activity: April-September 2017 (possibly ongoing)

Project coordinator: Sue San Andreas

Phone: ###-###-#### Email: Sue@stumptownna.com

Project/Event/Activity 6: _____

Please describe of how this project will benefit and serve the mission of your organization.

Types of fundraising efforts (seeking in-kind donations like refreshments, soliciting financial donations from neighbors, applying for grants, etc.):

Date for event/project culmination and anticipated months of fundraising activity: _____

Project coordinator: _____

Phone: _____ Email: _____

Fiscal Sponsorship ANNUAL REPORT

Reflect on the previous year and answer the following questions **for each project that your organization wishes to renew**. If a question is not relevant to your project, please write in 'n/a.'

Project/Event/Activity: **General Account**

- 1. Successes:** Describe the project's benefits (tangible and intangible) to the community. List any project milestones and/or main activities accomplished in the past year.

We are saving up donations so that we can direct them to future community needs as they arise. This past year we spent some of these funds on National Night Out expenses, and to support a student project that increased pollinator habitat in our neighborhood park.

- 2. Mission compatibility:** Describe how you think your project met SE Uplift's mission of "empowering citizens and neighborhood associations to create communities that are livable, socially diverse, safe and vital."

Our neighborhood association has a similar mission of creating community and increasing safety, so by supporting us, donors are supporting SE Uplift's mission.

- 3.** Did you use SE Uplift's tax id to fundraise? How? (grant applications, donations, in-kind, other)

Yes. Fred Meyer Rewards, general donations by PayPal.

- 4.** Did you raise funds without SE Uplift's tax id? How much did you raise?

No.

- 5. Help us quantify some of the results of your efforts!**

n/a	Number of volunteers that participated with your project (Give your best estimate.)
	Number of attendees at each event, meeting or other gathering (Give your best estimate. List each type of event/meeting/gathering separately. Examples below – modify to describe your project.)
	We will report on numbers for NNO below
20	People participated in the student project and our funds helped encourage participation by purchasing refreshments.

- 6. Did your project build partnerships and/or relationships with other non-profit organizations, businesses, public agencies?** Think about who helped you fundraise, recruit volunteers, or get the word out about your project. **Include names of businesses, agencies and other non-profit groups that you worked with below.**

We connected neighbors with all different types of public agencies and orgs at NNO, and students with city resources for the pollinator project. We partnered with Portland Parks, Planning and Sustainability, Crime Prevention, Police and East Multnomah Soil and Water Conservation District, as well as Fred Meyer, Bird and Bee Nursery, and Stumpy's Coffee House.

Attach at least one image from your project. It could be a picture of an event or meeting, flyer, postcard or something else. Be creative, and if you have more than one image, please share!

Fiscal Sponsorship ANNUAL REPORT

Reflect on the previous year and answer the following questions **for each project that your organization wishes to renew**. If a question is not relevant to your project, please write in 'n/a.'

Project/Event/Activity: **National Night Out**

1. **Successes:** Describe the project's benefits (tangible and intangible) to the community. List any project milestones and/or main activities accomplished in the past year.

We had a great turnout this year – bigger than last year. We also had the Tool Library and Neighborhood Emergency Team show up this year for demonstrations, and were able to teach neighbors about how to prepare their houses for earthquakes. The band was a hit, and members of the local church really brought some great food for the potluck. The NET and Tool Library demonstrations helped people learn new skills, and build connections between people who wanted to help each other get ready for earthquakes. In fact, some of those people are starting a new E-Prep Committee for the NA.

2. **Mission compatibility:** Describe how you think your project met SE Uplift's mission of "empowering citizens and neighborhood associations to create communities that are livable, socially diverse, safe and vital."

The whole point of National Night Out is to build community, create connections with the diversity of types of people in the neighborhood and increase public safety and livability.

3. Did you use SE Uplift's tax id to fundraise? How? (grant applications, donations, in-kind, other)

We used SE Uplift's tax ID to get several donations from developers putting big apartment buildings, plus in-kind donations of food and drinks from the local grocery stores and restaurants.

4. Did you raise funds without SE Uplift's tax id? How much did you raise?

We passed the hat at NNO.

5. **Help us quantify some of the results of your efforts!**

20	Number of volunteers that participated with your project (Give your best estimate.)
	Number of attendees at each event, meeting or other gathering (Give your best estimate. List each type of event/meeting/gathering separately. Examples below – modify to describe your project.)
5	# of attendees at recurring planning/coordinating meetings x <u>12</u> planning meetings that lasted <u>2</u> #hours on average
200	# of attendees at the event

6. **Did your project build partnerships and/or relationships with other non-profit organizations, businesses, public agencies?** Think about who helped you fundraise, recruit volunteers, or get the word out about your project. **Include names of businesses, agencies and other non-profit groups that you worked with below.**

EMSWCD, Planning Bureau and Police came to our event to help us out. The area Elks Club and Church recruited volunteers and helped spread the word about the party.

Attach at least one image from your project. It could be a picture of an event or meeting, flyer, postcard or something else. Be creative, and if you have more than one image, please share!

Fiscal Sponsorship ANNUAL REPORT

Reflect on the previous year and answer the following questions **for each project that your organization wishes to renew**. If a question is not relevant to your project, please write in 'n/a.'

Project/Event/Activity: Spring Seed Swap Party

- 1. Successes:** Describe the project's benefits (tangible and intangible) to the community. List any project milestones and/or main activities accomplished in the past year.

A good number of volunteers come out for the seed swap party, and it is growing from year to year. People learn about how to protect pollinators and care for urban wildlife, as well as learn about how native plants benefit our ecosystem. We are also helping some neighbors to be more self-sufficient by teaching them how to grow their own food. This indirectly supports emergency preparedness because people will have food to eat if our transit systems are out of order. In addition to learning, the project supports people in making new relationships with neighbors and investing in one another's well-being.

- 2. Mission compatibility:** Describe how you think your project met SE Uplift's mission of "empowering citizens and neighborhood associations to create communities that are livable, socially diverse, safe and vital."

This is definitely a community-building project.

- 3.** Did you use SE Uplift's tax id to fundraise? How? (grant applications, donations, in-kind, other)

Yes – we received in-kind donations of mason-bee tubes/houses, and some garden books and tools for the raffle. We received one bigger cash donation this year for the party. We would like to spend the remainder of that donation on the party that's happening this spring either by donating it to the SBA (which is a 501c3) or by spending the remaining funds on supplies needed for the party in the next few weeks

- 4.** Did you raise funds without SE Uplift's tax id? How much did you raise?

no

- 5. Help us quantify some of the results of your efforts!**

3 Number of volunteers that participated with your project (Give your best estimate.)

Number of attendees at each event, meeting or other gathering (Give your best estimate. List each type of event/meeting/gathering separately. Examples below – modify to describe your project.)

1 # of attendees at recurring planning/coordinating meetings x n/a planning meetings that lasted _#hours on average
Our coordinator reports that she spent 50+ hours planning this year's event.

35 # of attendees at the event

- 6. Did your project build partnerships and/or relationships with other non-profit organizations, businesses, public agencies?** Think about who helped you fundraise, recruit volunteers, or get the word out about your project. **Include names of businesses, agencies and other non-profit groups that you worked with below.**

Master Gardeners, local nursery

Attach at least one image from your project. It could be a picture of an event or meeting, flyer, postcard or something else. Be creative, and if you have more than one image, please share!

Fiscal Sponsorship

BUDGET WORKSHEET

This worksheet is meant to help project coordinators communicate a plan for how they will raise and spend money. Organization board members must review and approve this worksheet as part of the overall renewal process. Seeing a financial plan helps board members develop strategies to support the project and approve of the ways project funds may be spent. This worksheet also helps SE Uplift staff and board understand the scope of the project (e.g. volume of transactions, types of expenses).

Please complete a separate worksheet for each project your organization intends to add or renew. If you already have an existing project budget showing proposed income and expenses, *make a note* of that below, and attach it to the application in lieu of completing this worksheet.

Project/Event/Activity: **General Account**

Proposed income for the coming year

1. How much money do you plan to fundraise, and from what sources (e.g. cash, check, online donations, grant)?

~\$150 from Fred Meyer Rewards; \$200 PayPal Donations

2. What kinds of in-kind donations do you expect to seek (e.g. donated food, venue, supplies)?

Will possibly seek in-kind donations for food/coffee at upcoming events/meetings

Project expenses to be spent out of the fiscal sponsorship account

Broad Category	Item Description(s)	Estimated Cost/ Dollar Amount	Seeking In-kind? Y/N
Personnel (Contracting for services, stipends, etc.)	Our board votes on expenses as they come up. Will likely spend no more than \$200 out of the account in the coming year.		
Supplies/Materials			
Outreach/Publicity (flyers, signage, mailings, ads)			
Event-related expenses (food, renting tables/tents, cutlery)			
Permitting/Fees			
Administration (insurance, fiscal sponsorship fee)			
Other			
Total Amount			

Fiscal Sponsorship

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Project/Event/Activity: **National Night Out**

Proposed income for the coming year

- How much money do you plan to fundraise, and from what sources (e.g. cash, check, online donations, grant)?

\$5,000 donations from developers and individuals (check, cash, online PayPal button);

- What kinds of in-kind donations do you expect to seek (e.g. donated food, venue, supplies)?

In-kind donations for refreshments/party supplies

Project expenses to be spent out of the fiscal sponsorship account

Broad Category	Item Description(s)	Estimated Cost/ Dollar Amount	Seeking In-kind? Y/N
Personnel (Contracting for services, stipends, etc.)	Face Painter	\$250	
	Clown	\$250	
	Bouncy House	\$1,500	
Supplies/Materials	Misc. Supplies	\$100	
Outreach/Publicity (flyers, signage, mailings, ads)	Newsletter mailing (fee covered by NA) Facebook ads	\$100	y
Event-related expenses (food, renting tables/tents, cutlery)	Food	\$500	Y
	Tent rental/generator/stage	\$1,500	N
	Barricades	\$50	N
	Tables/cutlery	\$200	Y
Permitting/Fees	Park use fee – waived for NNO Mult. Co. Food Handler's Fee	\$50	
Administration (insurance, fiscal sponsorship fee)	Insurance (covered by SE Uplift) Fiscal sponsorship fee (waived by SE Uplift)		
Other	Contingency funds	\$500	
Total Amount		\$5,000	

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Project/Event/Activity: SNA Mural

Proposed income for the coming year

1. How much money do you plan to fundraise, and from what sources (e.g. cash, check, online donations, grant)?

Apply for Regional Arts and Culture Council (RACC) Mural Grant: \$3,500 for artist, paint, some supplies, permit costs; Donation fund drive for student volunteer stipends

2. What kinds of in-kind donations do you expect to seek (e.g. donated food, venue, supplies)?

In-kind food for volunteers, t-shirts, volunteer time

Project expenses to be spent out of the fiscal sponsorship account

Broad Category	Item Description(s)	Estimated Cost/ Dollar Amount	Seeking In-kind? Y/N
Personnel (Contracting for services, stipends, etc.)	Artist Volunteer stipends	1,000 3@\$100	
Supplies/Materials	Paint Painting supplies	1,700	Y
Outreach/Publicity (flyers, signage, mailings, ads)	Covered by NA Communications Funds		
Event-related expenses (food, renting tables/tents, cutlery)	Food Open House Venue (donated by local coffee shop) Ice cream for celebration party (part in-kind/part cash)	100	Y
Permitting/Fees	Mural permit	50	
Administration (insurance, fiscal sponsorship fee)	Insurance covered by SE Uplift Fiscal sponsorship fee waived by SE Uplift		
Other	Incidental	350	
Total Amount		3,500	

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Please complete a separate worksheet for each project your organization intends to add or renew. If you already have an existing project budget showing proposed income and expenses, *make a note* of that below, and attach it to the application in lieu of completing this worksheet.

Project/Event/Activity: Resilient Stumptown NA

Proposed income for the coming year

1. How much money do you plan to fundraise, and from what sources (e.g. cash, check, online donations, grant)?

We don't plan to fundraise for cash donations or grants

2. What kinds of in-kind donations do you expect to seek (e.g. donated food, venue, supplies)?

Seeking in-kind donations for meeting refreshments and e-prep items for raffle prizes for neighbors who participate in hosting preparedness meetings on their blocks.

Project expenses to be spent out of the fiscal sponsorship account

Broad Category	Item Description(s)	Estimated Cost/ Dollar Amount	Seeking In-kind? Y/N
Personnel (Contracting for services, stipends, etc.)			
Supplies/Materials	Raffle prizes		y
Outreach/Publicity (flyers, signage, mailings, ads)			
Event-related expenses (food, renting tables/tents, cutlery)	Food		y
Permitting/Fees			
Administration (insurance, fiscal sponsorship fee)			
Other			
Total Amount			