

# FULCRUM

COMMUNITY RESOURCES

## Fiscal Sponsorship Packet

### Packet Includes:

1. Background
2. Process Description
3. Application Form

### BACKGROUND:

#### Incubating Community Sustainability

Fulcrum Community Resources' guiding philosophy is that the most effective and innovative projects are initiated at the grassroots community level.

Some projects, whether they are catalyzed by an individual or sponsored by a local organization, are too small or too new to have their charitable status recognized by the IRS. Other projects are temporary in nature. Many are candidates for fiscal sponsorship, because this allows the project to focus on achieving its program objectives rather than the administrative issues and costs inherent in establishing a new corporation and seeking IRS recognition of charitable status.

#### Fulcrum's Fiscal Sponsorship

Fulcrum extends its 501(c)3 tax exempt charitable status over select projects whose missions closely match Fulcrum's. **Donations are actually given to Fulcrum**, whether from an individual or foundation, and then are earmarked for a project operating under Fulcrum's sponsorship. This allows donors to receive the full benefits of making a charitable donation that is acceptable to the IRS. Fulcrum then places the donations in a special restricted fund dedicated to the support of the project.

Funds are disbursed to the project, and the project provides regular reports to document its activities and expenditures, in accordance with the terms of an agreement executed between the project and Fulcrum.

Since each fiscal sponsorship relationship is based on the needs of the project, applicants are encouraged to consult with Fulcrum before submitting a fiscal sponsorship application.

To defray administrative expenses, Fulcrum charges a fee of 5% (five percent) of donations or grants received in Fulcrum's name for the project.

To be considered for fiscal sponsorship, please submit the enclosed Fiscal Sponsorship Application. If you are not sure if your organization will further the mission of Fulcrum (details of which are listed on the following page), please call before submitting an application.

The application may be submitted by mail, e-mail or in person to a Fulcrum Board member.

We receive applications from all types of groups: large and small, established groups and start-up organizations. Therefore some of the questions may not apply to every group.

We will contact groups within a couple of weeks of receiving the application.

# FULCRUM

COMMUNITY RESOURCES

**Mission Statement:** Fostering the transition of the Nehalem Bay community to a sustainable future.

**Purpose & Goals:**

- Manifest the deep interconnectedness and community that is the heart of sustainability... for our grandchildren.
- Initiate and sponsor projects that assist transition of the Nehalem Bay community of coastal Oregon to a sustainable future.
- Develop support services to simpatico local groups, projects, and events as an umbrella. These services may include access to bookkeeping, legal resources, liability insurance, bulk mailing and computer graphics capabilities and, someday, even office space.
- Provide fiscal sponsorship (i.e. 501c3 tax exempt status) for funding for compatible groups and projects
- Organize and network among local organizations, as well as connect us all to the outside world.

***Fulcrum is a non-profit 501(c)3 tax exempt corporation.***

*All donations are tax-deductible.*

**Board of Directors:**

Barbara McLaughlin (President - 503-368-6874)

Lane deMoll (Secretary – 503-368-6294)

Lucy Brook (Treasurer- 503-368-3733)

Lianne Thompson (503-436-9013)

Tom Bender (503-368-6294)

**FULCRUM COMMUNITY RESOURCES**  
**FISCAL SPONSORSHIP APPLICATION**

**Project Name:** \_\_\_\_\_

**Date** \_\_\_\_\_

**Project Contact:**

**Name:** \_\_\_\_\_

**Organization:** \_\_\_\_\_

**Mailing Address/Zip:** \_\_\_\_\_

**Phone:** \_\_\_\_\_ **Fax:** \_\_\_\_\_

**Email:** \_\_\_\_\_ **Website:** \_\_\_\_\_

**Tax Status/Legal Identity of Project:** Individual\_\_\_\_, Sole Proprietorship\_\_\_\_, Corporation\_\_\_\_, Professional Corporation\_\_\_\_, Association\_\_\_\_, Partnership\_\_\_\_, Limited Liability Corporation\_\_\_\_, Limited Liability Partnership\_\_\_\_, Oregon Non-profit Corporation\_\_\_\_, Limited Partnership\_\_\_\_, Government Entity\_\_\_\_, Other (specify)\_\_\_\_\_

**Federal Tax I.D. or Social Security Number (for reporting purposes only):**\_\_\_\_\_

Attach a separate sheet to answer the following questions about your project:

**Project Description:**

1. Description of project - what is the project? What are its purpose and goals?
2. How does the project tie into Fulcrum Community Resources' mission, purposes and goals (see attached)?
3. Who is going to be involved with the project? Specifically what will be the responsibility and involvement of each of the project partners? Describe your and/ or your partner's previous experience, if any, with projects like this.
4. How will you raise funds? If applicable, include a list of foundations to which you are applying.
5. Other unique characteristics of the project, which would make it worthy of support.
6. Where will the project take place?

7. What is the plan for implementation of the project? What is the expected timeline for implementation of each of the activities or steps involved? What other activities or funding needs to be in place before the project can proceed? When will the project be completed?

8. How will the project be evaluated?

**Project Budget:**

Complete the included line item annual budget (or other appropriate time-period), including expenses and income for the project. Income includes in-kind (donated) contributions or services. Identify potential funding sources. (Samples available upon request.)

**References:**

Please provide us with references for you or your organization:

Name	Address	Phone/E-mail
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1.

2.

Please submit this application to Fulcrum Community Resources on-line at [fulcrumresources.org](http://fulcrumresources.org) , by sending an email to [info@fulcrumresources.org](mailto:info@fulcrumresources.org), in person to your Fulcrum contact person, or by mail to P.O. Box 766, Manzanita, OR 97130

Questions about this application should be directed to a Fulcrum Board member or by calling 503-368-6874 or by emailing [info@fulcrumresources.org](mailto:info@fulcrumresources.org)

## Projected Preliminary Budget Worksheet

	First Year	Second Year
<b><u>Support and Revenue</u></b>		
Contributions Already Received	_____	_____
Contributions Anticipated	_____	_____
Dues or memberships	_____	_____
Fees for services	_____	_____
Fundraisers	_____	_____
Grants	_____	_____
Sales	_____	_____
Special Events	_____	_____
Other (specify)	_____	_____
_____		
_____		
Total Cash	_____	_____
Contributions – In-Kind (noncash)		
Donated office space	_____	_____
Volunteer hours	_____	_____
Technical services	_____	_____
Other (specify)	_____	_____
_____		
_____		
Total In-Kind	_____	_____
TOTAL	_____	_____
<b><u>Expenses</u></b>		
Fundraising Expenses	_____	_____
Legal Fees	_____	_____
Salaries	_____	_____
Administration		
Accounting/Bookkeeping	_____	_____
Phone	_____	_____
Postage	_____	_____
Printing	_____	_____
Insurance	_____	_____
Dues & Subscriptions	_____	_____
Other (specify)	_____	_____
_____		
_____		
TOTALS	_____	_____
<b>Revenue Minus Expense</b>	_____	_____