



Fiscal Sponsorship Renewal Application

_____ (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):

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

Status (Select one for each project)

1	Renew	Terminate	Add
2	Renew	Terminate	Add
3	Renew	Terminate	Add
4	Renew	Terminate	Add
5	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: _____ **Date:** _____

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:

Please describe the project. Tell us how this project will 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:** _____

Project/Event/Activity 2:

Please describe the project. Tell us how this project will 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:** _____

Project/Event/Activity 3:

Please describe the project. Tell us how this project will 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:** _____

Project/Event/Activity

4: _____

Please describe the project. Tell us how this project will 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:** _____

Project/Event/Activity

5: _____

Please describe the project. Tell us how this project will 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:** _____

Project/Event/Activity

6: _____

Please describe the project. Tell us how this project will 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:**

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.

2. **Mission compatibility:** Describe how you think your project met SE Uplift's mission of "collaborating with the SE Portland community to build informed, inclusive, and participatory neighborhoods that support our social and ecological well-being."

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

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

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

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 in empty sections.)

6. **Did your project build partnerships and/or relationships with other non-profit organizations, businesses, public agencies or community groups?** 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.**

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: _____

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)?

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

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Approved by EXCOMM (circle): YES NO