

Fiscal Sponsorship Application and Guidelines

January 2014

The Florida Keys Green Living and Energy Education organization (GLEE) offers fiscal sponsorship and project management services to individuals and projects that do not have non-profit tax-exempt status. Tax-exempt status is required by many foundations, corporations and government agencies in order to be eligible for funding. As a fiscal sponsor, GLEE acts as an umbrella organization for an individual or project and accepts and administers funds on its behalf. GLEE is legally responsible for the funds received on behalf of fiscally sponsored projects and insures that the funds are used for charitable purposes, and that the donor reporting requirements are met in a timely fashion.

Fiscal sponsorship broadens the available funding avenues an individual or project can pursue. Fiscal sponsorships do not provide grants, however, and GLEE does not hold fundraisers for the project.

Eligibility and Considerations

In order to be eligible for a GLEE Fiscal Sponsorship, you must meet the following criteria:

- Reflect a similar commitment to the goals set forth in the GLEE mission
- The work supported must be for purposes which are legal, further a legitimate tax-exempt purpose and in no way jeopardize the tax status of GLEE
- meet the requirements outlined in the Review Criteria section of this application

Review Criteria

Projects are accepted by GLEE after being reviewed using the following criteria

- Relevance and significance of project to GLEE

Are subject matter and project consistent with the goals of GLEE's mission? Green Living & Energy Education (GLEE) is a non-profit 501(c)(3) organization created for educating individuals, businesses and policymakers within the Florida Keys community to promote sustainable actions through waste reduction, efficient and renewable energy, and the conservation of water and land resources.

- Likelihood of Project Completion/Success/Overall Positive Impact

Does the proposed project have a likelihood of making a positive impact in accordance with GLEE's mission? Is the project feasible?

- **Budget**
Is the budget well developed and realistic for the project? Does the proposal budget match the needs of the project and appropriate?
- **Fundraising ability**
Are funds already secured or likely to be secured? Has the project director identified appropriate sources of funding for the project? Are the potential funders appropriate for the project?
- **Demonstrated ability of key project personnel**
Do the applicant and the proposed personnel have the ability to successfully complete the proposed project?
- **Lobbying**
IMPERATIVE: *if your project will be engaging in allowed lobbying activities, GLEE must be informed and give consent prior to approving this application*

Fiscal Sponsorship Fee

The fiscal sponsorship fee is based upon overall funds brought into the project. There will be a standard 10% administrative handling fee.

Application Process

Please include the following materials with your application:

- A proposal that describes the project in greater detail
- The project budget
- A list of funders (both committed and pending)
- A list of project partners, steering or advisory committee members

Please submit all application materials to **GLEE, Attn: Fiscal Sponsorship and Project Management, PO Box 522469 Marathon Shores FL 33052**. After an application has been submitted, the GLEE Board of Directors will assign a GLEE community ambassador(s) to review it for eligibility. If the project appears to be a good fit and meets all of GLEE's criteria then a meeting/ site visit between the community ambassador(s) will be arranged to further discuss the details of the project and the terms of a fiscal sponsorship agreement. The community ambassador(s) will present their recommendations to the GLEE Board of Directors at the next scheduled GLEE board meeting for partnership approval or denial.

Application Review by GLEE

Applications are reviewed every 3 months at the GLEE Board meeting. The applicant may be invited to join a Project Review meeting and have an opportunity to describe the project in

further detail. Depending on the project a GLEE Board member or designated GLEE Ambassador may request to visit the project site prior to the Project Review meeting.

Application accepted

If the project is accepted, a Fiscal Sponsorship Agreement *{Appendix A}* is executed between GLEE and the Project Administrator. This agreement details the legal relationship between GLEE and the Project and is binding for 12 months. It is renewable provided both parties are in agreement. If any of the terms of the Agreement are violated, the agreement is considered cancelled.

A GLEE checking account is provided to the Project administrator/treasurer for project-related expenses and income. This is a sub-account under GLEE's name. Details such as the Project Treasurer's Social Security Number will be required by GLEEs Financial Institution to open the sub-account.

Guidelines for use of the GLEE logo and name in advertising, PR and project material will be provided.

Quarterly reporting of the project status will be made to the GLEE Board in Quarterly Project Review meetings. The option to conduct these by conference call or a submitted report may be available.

Fiscal Sponsorship Application

Project Title

Project Administrator (or Primary business contact for the project)

Role in project: Director Other: _____

Name of Organization and/or Project

Address

City

State

Zip

Telephone

Fax

Email

Website (if applicable)

Summary Description of Project:

Anticipated Length of Project _____

Will there be any 501(c)(3) allowed lobbying activities? Yes / No

If Yes, Please explain

Total project Budget \$ _____

Amount Raised to Date \$ _____

Please attach a detailed account of your project and how it fits into the mission of GLEE.

Are you currently a GLEE member? Yes / No

Note: ACTIVE GLEE membership is required for project consideration.

Please attach any fundraising plans you have/may have in the near future

Do you plan to sell any merchandise related to the project? Yes / No

Have you been fiscally sponsored before by GLEE Yes / No

If yes, for what project and year?

How did you hear about our fiscal sponsorship program?

- | | |
|--|---|
| <input type="checkbox"/> GLEE Representative | <input type="checkbox"/> Referral from Other Organization |
| <input type="checkbox"/> Referral from Colleague | <input type="checkbox"/> GLEE Newsletter |
| <input type="checkbox"/> GLEE Social Media | <input type="checkbox"/> Other: _____ |

Signature of Applicant

Date:

Appendix A

Fiscal Sponsorship Agreement template