

Fiscal Sponsorship



The fiscal sponsor indicates to the [redacted], in consideration of the receipt of the funds, its agreement to act as such fiscal sponsor for the grantee and its agreement to process all such funds fully for the program or project stated in the request, according to the budget as submitted. This funding is a restrictive grant requiring that these funds be held in trust for the named program or project. No right is given to redirect these funds to another purpose or entity without specific approval from the [redacted] Club. Without such approval, unexpended funds are to be returned to the Umpqua Valley [redacted].

As the fiscal sponsor, The Greater Douglas United Way will charge a [redacted] administration fee on the 2008 community campaign. This fee shall not exceed \$[redacted].

These funds must be exclusively used in the Douglas County, Oregon for the Expansion Project of the [redacted] Club. Acceptance confirms the continued tax-exempt status of the fiscal sponsor. In the event such status is changed or revoked by the Internal Revenue Service or any state, the grant shall be immediately terminated and all unexpended funds shall be repaid.

Acceptance also confirms that this organization does not directly or indirectly engage in, promote or support any terrorist activity and that it is not included on any lists of terrorist organizations compiled by the United States government or any other national or international body. This certifies that this organization does not knowingly employ people whose names appear on such government watch lists.

Please return an executed original of this agreement at your earliest convenience.

Very truly yours,

[redacted]
Executive Director

Accepted by:

Signature of Authorized Representative _____
Name (Printed) _____

Signature of Authorized Representative _____
Name (Printed) _____

Signature of Authorized Representative _____
Name (Printed) _____

Signature of Authorized Representative _____
Name (Printed) _____

Title

Date

Sponsorship Policies of The Greater Douglas United Way

1. Cash Advances

Under no circumstances does Greater Douglas United Way advance money to projects. Deposited funds must be cleared by the bank prior to any requested draw, which may take up to two weeks.

2. Grants Received

Greater Douglas United Way's Executive Director must co-sign all original grant agreements and be copied at least one week in advance on all progress and final report submissions. The preparation of grant reports is the responsibility of the project. Grants involving government or public agency monies have very heavy reporting and auditing requirements that a project must discuss in advance of acceptance with Greater Douglas United Way's Executive Director.

3. Donations

Greater Douglas United Way will accept, process, and acknowledge contributions to each project. This includes issuing receipts for tax deductions. Donations should be made payable to "Old Market, a project of Greater Douglas United Way".

It is not the Greater Douglas United Way accounting staff's responsibility to meet with a project's donors and walk them through paperwork. Greater Douglas United Way management will work with projects to educate them on the necessary forms to liquidate noncash gifts. Donations over \$250.00 will be individually receipted.

It is the Greater Douglas United Way management policy not to disclose publicly the identity of donors. The Greater Douglas United Way recommends that projects make no external disclosure of any donor's identity without the donor's permission.

4. Fundraising Activities

Fundraising activities are very labor intensive to administer. The Greater Douglas United Way management requires at least one month's notice of any fundraising events. A copy of all mailing and solicitations, including grant proposals, must be approved by The Greater Douglas United Way management in advance of mailing, submission, or other distribution. Every grant proposal should be accompanied by a cover letter from the Greater Douglas United Way.

5. Communications With Potential Donors

In the course of fundraising, a project may solicit commitments from donors prior to receiving the funds. In general, the Greater Douglas United Way regards such promises to give as mere statements of intention, which the Greater Douglas United Way will not enforce through legal action. In the unusual situation where a project

wishes to have a donor sign a legally enforceable pledge, contact the Greater Douglas United Way Executive Director.

The collection of any amounts for which potential donors have expressed intention to contribute shall be the responsibility of the pertinent project.

6. Financial Statements

The Greater Douglas United Way management will provide a statement of financial activity and a detailed trial balance within 30 days of each 6 months. Any corrections to a project's accounts must be requested within 30 days after receipt of that statement.

7. Administrative Fees

Except as stated below, the Greater Douglas United Way will charge each project an administrative fee equal to 1.5% of the Greater Douglas United Way's net receipts for the project's work – for first 3 years this will be waived in exchange for a yearly sponsorship.

8. Lobbying

Projects are prohibited from funding or undertaking lobbying or any other activities that could jeopardize the Greater Douglas United Way's charitable tax-exempt status. The Greater Douglas United Way has the right to determine, in its sole discretion, what constitutes lobbying by a project, and what other activities could jeopardize the Greater Douglas United Way's tax exempt status.

9. Loans to Projects

In general, projects are not permitted to accept loans through the Greater Douglas United Way, because of the risk to which the Greater Douglas United Way, its assets, and its other projects can be exposed. Only the Greater Douglas United Way's Board of Directors may grant exceptions to this policy.

10. Automatic Termination of Project

The Greater Douglas United Way's fiscal sponsorship of a project may be terminated by The Greater Douglas United Way Executive Director without advance notice to the project when (1) The Greater Douglas United Way fund for support of the project's work has a zero cash balance or (2) in the Greater Douglas United Way's sole judgment, the Greater Douglas United Way has not had any significant activity in connection with the project for one year or longer.

11. Extra Services

From time to time a project may need services (e.g., insurance coverage, legal advice, inventories of intellectual property) over and above those included in the regular administrative fee. When the specific costs of these services are identifiable,

the Greater Douglas United Way will charge them directly to the project's fund. The Greater Douglas United Way will inform projects when such charges are necessary.

12. Project E-mail Accounts

Each project must provide the Greater Douglas United Way with the addresses of active e-mail accounts for the Project Chair and/or the Project Director.

13. Amendments

The Greater Douglas United Way may amend these policies from time to time with the consent of the project's authorized representative.

14. Acknowledgment

On behalf of this project, I have received, understand, and agree to the foregoing sponsorship policies of the Greater Douglas United Way.

Roseburg Oldtown Market Advisory Committee

Delores Spencer, Aaron McManus, Patrick Sterns

By:

_____, Chair GDUW

Dated:

And

By:

_____, Project Director

(This form approved by the Greater Douglas United Way Board)