



Fiscal Sponsorship Handbook

This digital handbook provides resources such as an overview of fiscal sponsorship policies, our Code of Conduct, and our Diversity, Equity, Inclusion and Access (DEIA) Code of Ethics.

PREREQUISITES

- ❑ Form a Governing Body (e.g. board, steering committee).
Oregon requires a President/Chair and Secretary. Other common roles include Vice President/Vice Chair and Treasurer.
- ❑ **[Oregon Secretary of State](#)**: Register as a Domestic Nonprofit Corporation (DNP). You will need to renew online annually by filing an annual report.
- ❑ **[Articles of Incorporation](#)**: File with the Oregon Secretary of State and send a copy to SE Uplift. Instructions available [here](#).
- ❑ **[Oregon Department of Justice, Charitable Activities](#)**: Register as a Charity. You will also need to file [annual reports](#).
- ❑ Complete the **[Fiscal Sponsorship Application](#)**. A template is available [here](#).
- ❑ The Governing Body meets and approves signing the Fiscal Sponsorship Agreement.

READ

- ❑ **Program Guides: [FY23-24](#), [FY24-25](#)**
Frequently asked questions and information on fiscal sponsorship policies to help you understand SE Uplift's and your organization's roles and responsibilities.
- ❑ **[Diversity, Equity, Inclusion and Access \(DEIA\) Code of Ethics](#)**
This DEIA Code of Ethics provides guidance on conduct expected of fiscally sponsored organizations to support greater alignment of behaviors towards promoting equity and justice throughout our community.
- ❑ **[Code of Conduct](#)**
- ❑ **[Fundraising Guide for Fiscally Sponsored Org](#)**
A guide to the fundraising roles and responsibilities of SE Uplift and your organization.

BOOKMARK

- ❑ [Check Request Form](#)

Email completed check requests for invoices or reimbursements, with supporting documentation, to lindsey@seuplift.org. Allow up to ten business days for processing.

- ❑ [W-9](#)

Required for any individual or business that will receive \$600+ from SE Uplift within a calendar year. An updated W-9 must be provided if the individual or business's tax information changes (name, tax ID, mailing address).

COMPLETE (optional)

Fundraising

- ❑ [Give Lively campaign page template](#)

Submit to Fiscal Sponsorship Program Manager.

ADDITIONAL RESOURCES

Glossary

- ❑ [Apos: The Definitive Glossary of Nonprofit Terms](#)

Grants

- ❑ [The Nonprofit Association of Oregon: Funding Opportunities](#)

- ❑ **Oregon Foundations DataBook** (most recent edition: 2020). Available [here](#) through Multnomah County Library.

Language Services (Interpretation, Translation)

- ❑ [The Immigrant and Refugee Community Organization \(IRCO\)](#)

Legal

- ❑ [Center for Nonprofit Law](#)

Resources

- ❑ [Nonprofit Association of Oregon: Resource Library](#)

Trainings

- ❑ [SE Uplift's YouTube Trainings Playlist](#)
- ❑ [Nonprofit Association of Oregon: Events & Trainings](#)