



Southeast Uplift  
3534 SE Main St  
Portland, OR 97214  
p: 503 232-0010  
[www.seuplift.org](http://www.seuplift.org)

# FISCAL SPONSORSHIP PROGRAM GUIDE

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***EVERYTHING YOU NEED TO KNOW TO GET STARTED ON  
FISCAL SPONSORSHIP WITH SOUTHEAST UPLIFT  
NEIGHBORHOOD COALITION***

## Mission Statement:

*Collaborating with the Southeast Portland community to build informed, inclusive, and participatory neighborhoods that support our social and ecological well-being since 1968. We also joyfully support neighborhoods in Northeast Portland that are located south of I-84.*

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## 1. INTRODUCTION

SE Uplift is proud to play a role in helping to incubate grassroots-driven organizations and projects that are located within and/or serve people in the 20 neighborhoods that make up the SE Uplift district in Portland. Our fiscal sponsorship program removes the barrier that small organizations commonly face when seeking grant funding for their work: eligibility is usually limited to federally recognized 501c3 nonprofit organizations. In addition, most individuals and businesses are more inclined to donate to a tax-exempt organization so their donation can be tax deductible. That's where we come in!

Becoming a fiscally sponsored organization (FSO) of SE Uplift allows us to extend our tax-exempt status to other organizations doing work that aligns with our mission. Since 1968, our organization has been collaborating with the Southeast Portland community to build informed, inclusive and participatory neighborhoods that support everyone's social and ecological well-being. We also joyfully support neighborhoods in NE Portland that are located south of 1-84.

The SE Uplift staff is committed to the success of our fiscally sponsored organizations. By joining our fiscal sponsorship network, your organization will have a trusted guide to help you build your capacity to serve your audience and learn nonprofit best practices. Whether your organization intends to become its own 501c3 nonprofit, or is content to remain an FSO, SE Uplift can meet your organization where it's at. We look forward to working with you!

## 2. HOW FISCAL SPONSORSHIP WORKS

### A. What is Fiscal Sponsorship?

Fiscal sponsorship can simply be defined as the practice of a 501c3 organization extending its legal, tax-exempt status to a group engaged in activities related to the sponsor organization's mission. In a fiscal sponsorship arrangement, the sponsor (SE Uplift) accepts tax-deductible donations and grants on behalf of the sponsored organization (your group). The sponsor is then responsible for stewarding the use of those funds by ensuring that they are used only toward charitable purposes and according to any donor restrictions, such as a grant contract that was awarded to fund expenses of a specific program.

The fiscal sponsorship relationship must be formally outlined in a mutually agreed upon contract signed by the fiscal sponsor and the fiscally sponsored organization (FSO). The fiscal sponsor provides fiduciary oversight, financial management of charitable funds, and other administrative services to help build the capacity of the charitable project.

### B. What types of fundraising can my organization do with its fiscal sponsorship?

SE Uplift can accept on your organization's behalf any **grants** you are awarded, as well as **contributions from individuals or businesses**. SE Uplift must be named as the recipient of all funds for your organization for them to be considered charitable. Your organization will arrange for a review of any grant application or report materials at least 10 business days

prior to the funder's deadline. Additional guidelines related to fundraising as a SE Uplift fiscally sponsored organization will be provided during your orientation.

SE Uplift can accept cash, online, and check donations. Checks must be made payable to SE Uplift with a note in the memo line indicating it is for your organization and, if applicable, a specific program of your organization. Donations can either be sent directly to SE Uplift or collected by your Principal Coordinator and then submitted to SE Uplift.

You can also solicit for a **donation of goods** (also known as an in-kind donation) through your fiscal sponsorship. For an in-kind donation to be considered tax deductible, it must be tracked and reported to SE Uplift on a quarterly basis. The Fiscal Sponsorship Program Manager can work with you to prepare a letter to acknowledge an in-kind donation, such as if a grocery store donates \$100 worth of food to your organization's event.

Your organization is responsible for maintaining its list of donors and supporters for cultivation purposes.

#### C. What types of contributions does the IRS consider tax deductible?

Transaction	Deductibility
<b>Donation of Money</b>	<b>Fully Deductible:</b> When a donor gives money to a charity and receives nothing in exchange for the gift, that donation is fully tax deductible to the extent permitted by law.
<b>Donation of Tangible Goods</b>	<b>Fully Deductible:</b> When a donor gives tangible goods, the donation is tax deductible based on the donor's estimate of the item's value.
<b>Purchase of Benefit Tickets, Auction Items, etc.</b>	<b>Partially Deductible:</b> When a donor gets something in exchange for their contribution, they are only entitled to a tax deduction for the amount contributed in excess of what the donor received in exchange.
<b>Donation of Services</b>	<b>Never Deductible:</b> When a donor gives pro-bono services, the donation is not considered tax deductible according to the IRS.

#### D. Will SE Uplift identify and write grants for my organization?

No. You know your organization best and will be responsible for identifying funding opportunities that align with your work, and for submitting proposals and reports on time. SE Uplift can provide technical guidance on your application or report and is responsible for reviewing its content before it is submitted.

If SE Uplift learns of a funding opportunity that may be a good fit, we will let you know, but grant research is not something that we have capacity for. [Subscribe to our e-newsletter](#), which sometimes includes funding opportunities that we have discovered.

While your organization is responsible for preparing your grant proposal and report narratives and budgets, SE Uplift must sign off on the content before it is submitted. Upon approval of your fiscal sponsorship application with SE Uplift, you will attend an orientation and receive a handbook that covers everything you need to know about the grant application and reporting process.

## E. Can funds be raised for general expenses not associated with a specific program?

Yes. As your fiscal sponsor, we are responsible for stewarding the funds in your SE Uplift account according to the donor's wishes.

- You can raise funds for *general operating support*, which provides you with the greatest flexibility because your organization can decide how to use the funds, including on things such as overhead, salaries, and equipment that project grants may not allow. General support dollars are considered "unrestricted" funds.
- You may also raise funds for a specific purpose, such as to support a program, project, event, or activity. Funds raised for specific purposes may only be spent on that purpose and are therefore considered "restricted" funds.

If you become fiscally sponsored by SE Uplift, we will create an account for you within our bookkeeping system. You may have a "general" account for any funds with no restrictions on how they are spent. You may also have a subaccount for any specific programs or grants that you want to track separately. SE Uplift will work with you to determine the categories you wish to have in your account.

## F. How will our organization access the funds in our account at SE Uplift?

All the funds you raise for your fiscally sponsored organization will stay in your account at SE Uplift until needed for general or program-related expenses. Your group will authorize a Principal Coordinator to submit check requests with accompanying documentation to SE Uplift to draw on the funds in your account.

- **Reimbursement:** A check request may be submitted by your Principal Coordinator for authorized expenses that have already been paid by your organization (with receipts included) to SE Uplift for reimbursement.
- **Invoice:** A check request may be submitted by your Principal Coordinator with an unpaid invoice, to have SE Uplift pay the vendor directly.

*Any individual or business that is receiving \$600 or more within a calendar year must also supply a completed [W-9 form](#) for SE Uplift's records. The W-9 must be submitted with the check request form for the payment to be processed. W-9 forms only need to be submitted once per individual or organizational recipient, unless there is a change to their name, mailing address, or tax ID number.*

*Any check request that names the Principal Coordinator as the payee must include the signature of another authorized individual from the organization.*

## G. Our tax-exempt application with the IRS is still pending and a grant opportunity is coming up. Help!

It can take several months for the Internal Revenue Service (IRS) to approve an application for tax-exempt status. If your organization has a pending application with the IRS and you need a temporary fiscal sponsor, please contact our Fiscal Sponsorship Program Manager to explore your options.

### 3. WHAT NOT TO DO

**A. Can we use funds donated for one program on a different or alternative program?**

No. Legally, SE Uplift is required to ensure that donations made to your organization through SE Uplift are used as the donor intended. If your organization cannot fulfill its grant deliverables, the funds will either need to be returned or used on a similar effort that fulfills the same purpose. Alternatively, your group could request permission from the funder or individual donor to reallocate the funds for another program.

**B. Can SE Uplift pay our organization's staff through its payroll?**

No. Under SE Uplift's fiscal sponsorship model, the fiscal sponsor and the sponsored organization are separate legal entities. Only SE Uplift employees can be paid through SE Uplift's payroll. We strongly advise you to consult with an expert familiar with Oregon's strict employment laws to determine if managing your own payroll and/or hiring independent contractors is suitable for your organization.

**C. Can SE Uplift write a check to my organization for the amount of any grants we get?**

No. It is illegal for a fiscal sponsor to take in funds and simply pass them through to a fiscally sponsored organization. By law, the fiscal sponsor must hold the sponsored organization's charitable funds in a bookkeeping account managed by the fiscal sponsor and ensure that they are spent according to the donor's intent.

**D. Can we deposit charitable donations into our own bank account if we share the records with SE Uplift?**

No. All charitable funds raised for your organization must name SE Uplift as the recipient, note that the funds are intended for your organization, and be deposited into your fiscal sponsorship account at SE Uplift to be considered tax deductible. *Fiscally sponsored organizations are strictly prohibited from accepting charitable funds directly.*

**E. Can my organization start accepting donations and applying for grants while waiting for our fiscal sponsorship application to be approved?**

No. SE Uplift would be out of IRS compliance if an applicant started raising money before they were officially recognized as a fiscally sponsored organization, which is why this is never allowed. Please contact our Fiscal Sponsorship Program Manager if your organization has already submitted a grant application and is still awaiting tax exempt determination from the IRS.

**F. Can SE Uplift give us a check to pay for expenses so we don't have to pay out-of-pocket and get reimbursed from our fiscal sponsorship account?**

No. SE Uplift cannot advance funds to your organization. However, we can pay a vendor directly on your behalf if you submit a check request that includes a vendor invoice. SE

Uplift recognizes that paying upfront then getting reimbursed can present a financial burden, which is why we work to process check requests as quickly as possible! Your Principal Coordinator can help speed things up by ensuring that each check request submission includes all required documents such as an invoice or receipts, and if needed, a W-9 form.

## 4. BEFORE YOU APPLY

### A. What are the eligibility requirements to be fiscally sponsored by SE Uplift?

To be eligible for fiscal sponsorship with SE Uplift, your organization must:

- Demonstrate alignment with SE Uplift's mission
- Be located in and/or serve people who live, work, attend school and/or play in any of the 20 neighborhoods that make up the SE Uplift [district coalition area](#)
- Not engage in activities prohibited for tax exempt organizations, such as endorsing or opposing a candidate for elected office
- Have the capacity to designate a Principal Coordinator that will serve as the key contact and shares our commitment to effective and responsive communications, as well as a Secondary Coordinator
- Be willing to adhere to SE Uplift's [Diversity, Equity, Inclusion, and Accessibility Code of Ethics](#) and our [Code of Conduct](#) policies

### B. How long does it take to become fiscally sponsored by SE Uplift?

Depending on when you first contact SE Uplift, and how quickly we can move through the application process together, it can take up to a few weeks to become fiscally sponsored. Organizations that are well-organized and responsive to SE Uplift often get through the application process much faster. If you intend to apply for a grant as soon as you have secured fiscal sponsorship, *be sure to factor this into your timeline.*

### C. How much does it cost to be fiscally sponsored by SE Uplift?

SE Uplift does not charge any start-up/onboarding fees or require a minimum account balance.

Through June 30, 2024, SE Uplift's fiscal sponsorship program uses a sliding scale fee structure:

- **Tier I:** Fiscal Sponsorship service is provided for free to groups whose only fundraising activity is being awarded a small grant from SE Uplift.
- **Tier II:** Organizations with an account balance of under \$25,000 pay a \$50 annual fee (deducted from the general account) in June, at the close of the fiscal year.
- **Tier III:** Organizations with an account balance of \$25,000 or more pay a 10% fee on revenue as it is received during SE Uplift's fiscal year (July 1- June 30). Fees are currently capped at \$25,000.



Effective July 1, 2024, SE Uplift's fiscal sponsorship program will use the following administrative allocation rates:

- **SE Uplift Grantees:** Fiscal Sponsorship service is provided for free to groups whose only fundraising activity is being awarded a small grant from SE Uplift.
- **Reimbursable and Government Grants:** 10% deducted from incoming funds.
- **All other revenue:** 7.5% deducted from incoming funds.

SE Uplift may also deduct from your account any special or unusual costs, including banking fees, penalties, late fees or stop-payment charges, or similar fees resulting from contributions, or the cost of reports or compliance measures required by funding sources.

**D. What information will I need to complete the fiscal sponsorship application?**

SE Uplift's fiscal sponsorship application includes a link to an application template, so that you can gather all the information you need before you apply. We will collect information on your organization's mission, governance, programs and activities, equity measures, and more.

**E. How detailed and complete does my fiscal sponsorship application need to be?**

Submitting an incomplete application could delay approval of your fiscal sponsorship. Please provide as much detail as possible in the application. SE Uplift staff are available to answer your questions and reduce any barriers you may have to submitting your application.

**F. What if we don't yet know who the Principal Coordinator and Secondary Coordinator are going to be for our organization?**

Your organization will need to identify someone to serve as the Principal Coordinator – the primary point of contact between your organization and SE Uplift – as well as a Secondary Coordinator. Your Principal Coordinator and Secondary Coordinator must be identified within the application. They will be required to attend an orientation with SE Uplift staff and sign the Fiscal Sponsorship Agreement to acknowledge an understanding of the fundraising and reimbursement processes before fundraising activity of any kind can begin. If you are unable to identify a Principal and/or Secondary Coordinator, please contact the Fiscal Sponsorship Program Manager at SE Uplift to discuss the possibility of moving forward with submitting your application, despite the missing element.

**G. What does being a part of a Neighborhood Association entail?**

In certain circumstances, it may make sense for your group to become an official program, project, or committee of a Neighborhood Association (NA). This would require that you establish a meaningful and fully integrated relationship with the NA. If the NA is an independent 501c3 nonprofit, they may be willing to serve as your fiscal sponsor and/or absorb your efforts into theirs. If the NA is fiscally sponsored by SE Uplift, the scope of your efforts, your Principal Coordinator, and your estimated annual budget must be formally approved by the NA and reaffirmed yearly. The Principal Coordinator for your

organization must also keep close contact with the NA board to communicate regularly regardless of level of activity and provide updates to the neighborhood to ensure that the board has appropriate oversight of your efforts.

Your group must be recognized as an effort of the NA in all outreach materials. It must also thank all donors on behalf of the NA. The NA must acknowledge and promote your efforts in their communications including, but not limited to their website, social media, newsletters and at meetings and public events, when/wherever relevant and possible. Good visibility for the Neighborhood Association means more opportunities to plug the community back into your project. Ask the NA to table at their events!

You can ensure a meaningful relationship with a Neighborhood Association by helping to promote their other activities and events and using this as an opportunity to boost your group's presence with neighborhood-related content. You can also work with the NA to recruit new volunteers, build a support network, and secure future stewards for the project. SE Uplift encourages you to regularly ask the NA board members and general membership if they would like to be involved in your efforts (long term or short term) and then help engage them in meaningful ways, with specific tasks. Use this as an opportunity to create long-term buy-in for your efforts.

SE Uplift's Fiscal Sponsorship Program Manager can help you determine if this arrangement is right for your group and help you navigate the next steps.

#### **H. Do we need to renew our fiscal sponsorship with SE Uplift?**

Yes. Your fiscal sponsorship agreement will be valid for one year. You will need to apply for renewal annually, including providing an annual summary of your organization's accomplishments and signing an updated agreement.

### **5. APPLICATION + ONBOARDING PROCESS**

#### **A. Contact our Fiscal Sponsorship Program Manager**

If your organization is considering pursuing fiscal sponsorship by SE Uplift, we invite you to contact our Fiscal Sponsorship Program Manager to schedule an initial conversation to determine your organization's eligibility and answer any questions you have about the process.

#### **B. Complete the Application**

If it seems like your organization may be a good fit for fiscal sponsorship by SE Uplift, we will invite you to complete an online application that collects pertinent information about your organization. SE Uplift's fiscal sponsorship application includes a link to an application template, so that you can prepare your answers offline then paste them into our online form.

### **C. Get Approved**

After your application has been submitted, it will be reviewed and evaluated by staff.

### **D. Attend an Orientation**

Understanding each of our roles and responsibilities is the first step to a successful fiscal sponsorship relationship. Once approved, SE Uplift will work with your organization to arrange time for an orientation to walk you and your team through the nuts and bolts of how our fiscal sponsorship program works. We will provide you with materials to review in advance so you can leave the orientation prepared to sign your agreement with SE Uplift.

### **E. Sign the Fiscal Sponsorship Agreement**

If your organization is approved, the fiscal sponsorship relationship must be formally outlined in a mutually agreed upon contract signed by both the fiscal sponsor (SE Uplift's Executive Director) and the fiscally sponsored organization (your Principal and Secondary Coordinators). A drafted agreement and any materials referenced in it will be provided to you for review. If you have questions before signing, we invite you to contact our Fiscal Sponsorship Program Manager. Once your organization and SE Uplift have signed the agreement, your fiscal sponsorship begins!

The term of your fiscal sponsorship agreement will be for one year; it may be renewed annually. SE Uplift will contact your organization in advance of the agreement's expiration date to share with you the renewal process so that your group has seamless fiscal sponsorship coverage.

## **6. BOOKKEEPING BASICS**

*Please also see 2: WHAT NOT TO DO for additional financial best practices.*

### **A. How long will it take to access our account funds with SE Uplift?**

Check requests must be submitted by your organization's Principal Coordinator via properly completed forms supplied by SE Uplift and accompanied by required documentation such as receipts, invoices, and contracts no later than 30 days after the expense has incurred. While most check requests are processed within a week, please allow up to ten (10) business days for us to get the check out the door. If you are anticipating incoming funds from a grant or donation, those funds must be received by SE Uplift before we can process a check request to use them.

*Disbursement of funds may not exceed the amount of money contained in your account.*

### **B. How do we access SE Uplift's bookkeeping records for our organization?**

We will furnish your Principal Coordinator with a quarterly account balance for your organization around 2-3 weeks after each quarter ends. If your organization has a high volume of activity, the Principal Coordinator may request that the account balances be

provided monthly. A transaction report that shows revenue and expenses for your organization is available by request via contacting our Fiscal Sponsorship Program Manager.

**C. How do we access information about our online donors?**

SE Uplift will work with you to set up a campaign page so that donors to your cause can make a secure, online tax-deductible gift to your organization through our Give Lively account. Funds raised online for your organization will be transferred into your account at SE Uplift monthly. Arrange with our Fiscal Sponsorship Program Manager to request a donation report so you can cultivate a relationship with your donors. Your organization is responsible for maintaining its own donor list. Donor financial account information is secured according to law and best practice; it is not accessible to SE Uplift or your organization.

**D. Can SE Uplift provide Profit and Loss, Balance Sheet, and Budget vs Actual statements?**

No. Since our organizations are separate legal entities, we are unable to provide those financial reports for your organization. SE Uplift only manages and tracks your organization's *charitable* revenue and expenses and can provide your organization with periodic transaction reports on your financial activities as a fiscally sponsored organization. The Principal Coordinator must immediately report to us any discrepancies found in SE Uplift's accounting.

Your organization is responsible for developing its own annual budget and tracking all revenue and expenses, *including those that are not charitable*, to the best of your ability. If you need technical guidance on how to develop an annual budget, please contact our Fiscal Sponsorship Program Manager.

**E. What if someone donates a gift card to my organization?**

If your organization receives a gift card as a donation, the card must be tracked as an in-kind donation. All receipts for purchases made with the card must be submitted to SE Uplift.

**F. What happens if we receive tax-exempt status from the IRS?**

By law, SE Uplift may only transfer the balance of funds in your fiscal sponsorship account to another federally recognized tax-exempt nonprofit organization. If you receive 501c3 status from the IRS, SE Uplift will request a copy of your determination letter. We will then work with you and any grant funders to transfer all grant contracts that name SE Uplift over to your organization. Once this is complete, SE Uplift will send your organization a check for the balance in your account, less any applicable fees.

## 7. OTHER ROLES + RESPONSIBILITIES

### A. Do we need to acknowledge SE Uplift as a fiscal sponsor on our outreach materials?

Yes. SE Uplift does require a minimal amount of recognition on materials as part of your fiscal sponsorship. Your organization will be provided with a guiding document outlining expectations for acknowledgement once you have been formally accepted into the program.

### B. What recordkeeping is required?

SE Uplift and your organization agree to maintain all financial records relating to your fiscal sponsorship according to Generally Accepted Accounting Principles (GAAP), retain records as long as required by law, and make records available to auditors as required by law. SE Uplift and your organization will list your group's activities, to the extent required, on their respective state and federal government tax returns and financial reports.

### C. Do we need to tell SE Uplift about our events or media inquiries?

Yes. The Principal Coordinator should notify SE Uplift in advance about any public events, appearances, performances, or exhibitions. We can help amplify your outreach efforts by promoting your activities as appropriate. If you receive a media inquiry about your organization's work, please notify SE Uplift promptly.

### D. What should we do if we have a change in leadership, key activities or mission?

Your Principal Coordinator must immediately notify SE Uplift in writing should your organization be considering any material changes to its purpose, scope, or activities; any change to its legal or tax status; or if your organization will have a new Principal Coordinator or Secondary Coordinator.

### E. Are we required to meet regularly with SE Uplift once we are approved for fiscal sponsorship?

This depends on the volume of your fundraising activities and your support needs. SE Uplift will work with your organization to establish a mutually agreed upon frequency, time, and place with a co-created agenda. Either party should provide 48-hours advance notice should the meeting need to be rescheduled.

### F. Does SE Uplift provide liability insurance coverage for our activities?

It depends. SE Uplift provides general liability insurance to Neighborhood Associations in our district. If your organization is not a Neighborhood Association, you could form a partnership for your event with a Neighborhood Association and receive coverage through that partnership. Please contact our Executive Director to learn more.

SE Uplift extends Directors and Officers Insurance to Neighborhood Associations within the district, at the discretion of the SE Uplift Board of Directors.

## **8. BENEFITS OF FISCAL SPONSORSHIP WITH SE UPLIFT**

### **A. Knowledgeable and responsive staff**

Our staff has decades of experience in organizational development, fundraising and community organizing. We are committed to your organization's success and love to find ways to collaborate and amplify your efforts and connect you to others within our network!

### **B. Access to a fundraising page exclusively for your group**

SE Uplift can provide its fiscally sponsored organizations with access to a fundraising page established in our online giving portal exclusively for your organization to accept online donations. Ask our Fiscal Sponsorship Program Manager about how to get started!

### **C. Access to SE Uplift's other programs, activities, and resources**

When your organization become fiscally sponsored by SE Uplift, you become a key stakeholder with access to our free skill-building trainings, tools and templates; technical guidance for your fundraising efforts; and invitations to SE Uplift events and activities.

If you are interested in strengthening your leadership skills, we have opportunities for people in your organization to collaborate with other community organizers in our coalition by participating on a SE Uplift community committee. We welcome your participation in our houselessness, land use and transportation, climate justice, and civic engagement committees!

If your organization is interested in having a seat at the table on our board of directors, please contact our Executive Director to schedule a conversation.

*Nonprofits pledge to be faithful stewards of their donor's funds. This means they have an obligation to make the most of every dollar, comply with applicable regulations, and maintain proof that they are doing what they say they are doing with various donated items and money.*

*Everyone plays a part in ensuring that donations made in support of an organization, cause, program, or project are used as the donors intended. When we are transparent with how donor dollars are used, we not only underscore our commitment to accountability, but we also strengthen our donors' trust and build a more sustainable future for our collective efforts.*

*Thank you for entrusting SE Uplift with supporting your organization through its fiscal sponsorship journey.*



*Collaborating with the Southeast Portland community to build informed, inclusive, and participatory neighborhoods that support our social and ecological well-being since 1968. We also joyfully support Northeast Portland neighborhoods that are located south of I-84.*