

## PROOF OF FISCAL SPONSORSHIP

The Community Foundation of Western Massachusetts (CFWM) does not act as a fiscal sponsor on behalf of individuals or projects. However, CFWM may consider grant recommendations from Donor Advised funds (DAF) or requests from charitable programs that have a 501(c)(3) organization serving as a fiscal sponsor that meets CFWM's eligibility requirements. The fiscal sponsor has complete discretion and control over the funds granted to support the sponsored entity. By completing and signing this form, the fiscal sponsor agrees to:

- Carefully monitor the sponsored group's progress in successfully meeting its mission and program goals and retain records documenting how grant funds were spent.
- Assure that the board of directors (or equivalent) has agreed to be the fiscal sponsor for the entity named below.
- For competitive grants, reviews the sponsored organization's proposal prior to its submission to the CFWM.

All CFWM advised fund grant recommendations and competitive grant applications are subject to completing this Agreement. Complete documentation of the existing fiscal sponsor relationship with the non 501(c)(3) organization must be submitted concurrent to the deadline for any competitive grant program and before a grant from a Donor Advised Fund (DAF) can be approved. **Please complete the bottom portion of this Agreement and provide the three following documents to CFWM so we may make a determination of eligibility:**

- **A fully signed copy of a contract, Memorandum of Understanding or a grant agreement** between the fiscal sponsor and the sponsored organization documenting the relationship and the charitable nature of the undertaking.
- **A copy of the Minutes** of the meeting where the **fiscal sponsor's** Board of Directors approved this contract; **or a copy of the Board resolution** allowing the 501(c)(3) organization to act as the fiscal sponsor for the non 501(c)(3) entity; **or a copy of the Board resolution** allowing the executive director to enter into a fiscal sponsorship relationship.
- **Current audited or reviewed financial statements of the fiscal sponsor.** We are committed to working with newer and smaller organizations. If audited or reviewed financials are unavailable, please reach out to us at [grants@communityfoundation.org](mailto:grants@communityfoundation.org) so that we can discuss alternative documentation.

The parties listed below agree to this partnership for the period of time indicated below not to exceed one year.

Dates: \_\_\_\_/\_\_\_\_/\_\_\_\_ through \_\_\_\_/\_\_\_\_/\_\_\_\_

**501(c)(3) Fiscal Sponsor Organization Name:** \_\_\_\_\_ **Fiscal Sponsor EIN #:** \_\_\_\_\_

**Fiscal Sponsor Address:** \_\_\_\_\_

**Fiscal Sponsor Phone #:** \_\_\_\_\_

\_\_\_\_\_  
Signature of Head of Fiscal Sponsor

\_\_\_\_\_  
**Name & Title** of Fiscal Sponsor Representative

\_\_\_\_\_  
Email Address of Head of Fiscal Sponsor

\_\_\_\_\_  
Date

**Name of Sponsored Organization:** \_\_\_\_\_

**Sponsored Org. Address:** \_\_\_\_\_

**Sponsored Org. Phone #:** \_\_\_\_\_

\_\_\_\_\_  
Signature of Sponsored Organization Representative

\_\_\_\_\_  
**Name & Title** of Sponsored Organization Representative

\_\_\_\_\_  
Email Address of Sponsored Organization Representative

\_\_\_\_\_  
Date

Please email this completed form and attachments to [grants@communityfoundation.org](mailto:grants@communityfoundation.org)

This form is only valid for one year from the signature dates above.