434 NW 6th Ave. Suite 202
Portland, OR 97209

Fiscal Sponsorship Program Overview

Everything you need to know to get started on Fiscal Sponsorship with the District 4 Coalition

Equip neighborhoods with the resources, training, and advocacy tools they need to solve local challenges and thrive.

www.districtfourcoalition.org
(971) 430-1001

Table of Contents

Table of Contents 1
Introduction 3
How Fiscal Sponsorship Works 3
What is Fiscal Sponsorship? 3
What models of fiscal sponsorship does the District 4 Coalition offer? 7
What types of fundraising can my group do with its fiscal sponsorship? 7
What types of contributions does the IRS consider tax deductible? 8
Will District 4 Coalition identify and write grants for my group? 8
Can funds be raised for general expenses not associated with a specific program? 9
How will our group access the funds in our account with the District 4 Coalition? 9
Our tax exempt application with the IRS is still pending and a grant opportunity is coming up. Help! 9
What Not To Do 10
Can we use funds donated for one program on a different or alternative program? 10
Can D4C pay our organization's staff through its payroll? 10
Can D4C write a check to my group for the amount of any grants we get? 10
Can we deposit charitable donations into our own bank account if we share the records with D4C? 10
Can my organization start accepting donations and applying for grants while waiting for our fiscal sponsorship application to be approved? 11
Can D4C 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? 11
Before You Apply 11
What are the eligibility requirements to be fiscally sponsored by D4C? 11
How long does it take to become fiscally sponsored by D4C? 11
How much does it cost to be fiscally sponsored by D4C? 12
We just need a fiscal sponsor until the IRS rules on our application for tax-exempt status. How does D4C assess fees for this temporary scenario? 12
What information will I need to complete the fiscal sponsorship application? 13
How detailed and complete does my fiscal sponsorship application need to be? 13
What if we don't know who the Principal Coordinator is going to be for our group yet? 13
What does being a part of a Neighborhood Association entail? 13
Do we need to renew our fiscal sponsorship with D4C? 14
Application & Onboarding Process 14
Contact our Fiscal Sponsorship Program Manager 14
Complete the Application 14
Get Approved 14
Attend an Orientation 15
Sign the Fiscal Sponsorship Agreement 15

Bookkeeping Basics **15**
How long will it take to access our account funds with D4C? 15
How do we access D4C's bookkeeping records for our organization? 15
How do we access information about our online donors? 15
Can D4C provide Profit and Loss, Balance Sheet, and Budget vs Actual statements? 16
What if someone donates a gift card to my organization? 16
What happens if we receive tax-exempt status from the IRS? 16
Other Roles and Responsibilities **16**
Do we need to acknowledge D4C as a fiscal sponsor on our outreach materials? 16
What recordkeeping is required? 16
Do we need to tell D4C about our events or media inquiries? 17
What should we do if we have a change in leadership, key activities or mission? 17
Are we required to meet regularly with D4C once we are approved for fiscal sponsorship? 17
Does D4C provide liability insurance coverage for our activities? 17
Benefits of Fiscal Sponsorship with the District 4 Coalition **18**
Knowledgeable and responsive staff 18
Access to a fundraising page exclusively for your group 18
Access to D4C's other programs, activities, and resources 18

Introduction

District 4 Coalition 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 neighborhoods that make up Portland's District Four. 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 can help!

Becoming a fiscally sponsored organization (FSO) of District 4 Coalition (D4C) allows us to extend our tax-exempt status to other organizations doing work that aligns with our mission. Since 1979 our organization has been collaborating with neighbors in the Northwest and more recently, since the city of Portland drew new district boundaries in 2023, we have been working with neighbors spanning everything west of the Willamette River and a few neighbors on the east side.

The District 4 Coalition 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 while learning nonprofit best practices. Whether your organization intends to become its own 501c3 nonprofit, or is content to remain an FSO, District 4 Coalition can meet your organization where it's at. We look forward to working with you!

How Fiscal Sponsorship Works

What is Fiscal Sponsorship?

Fiscal sponsorship can simply be defined as the practice of a non-profit organization extending its legal, tax-exempt status to a group engaged in activities related to the sponsoring organization's mission. In a fiscal sponsorship arrangement, the sponsor (D4C) 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.

There are multiple models of Fiscal Sponsorship:

Models shown below are referenced from "Fiscal Sponsorship: 6 Ways To Do It Right" by Gregory L. Colvin and Stephanie L. Petit

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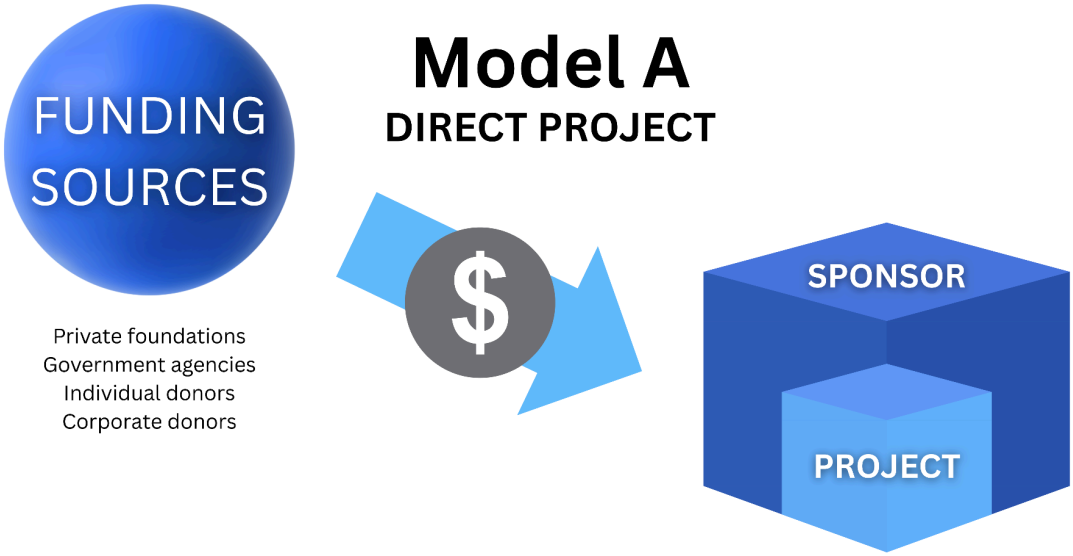
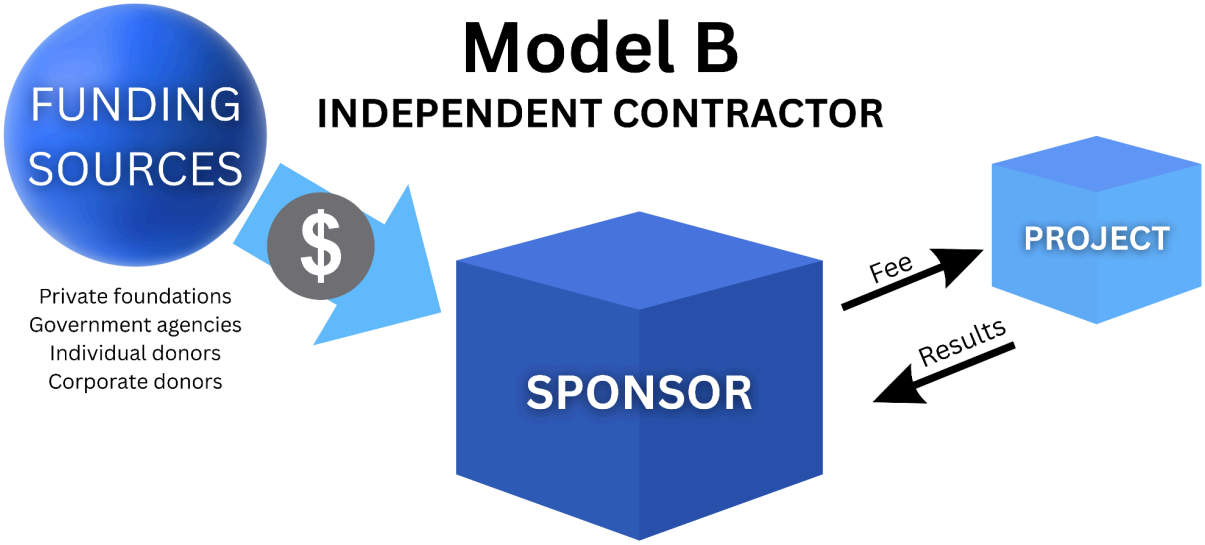
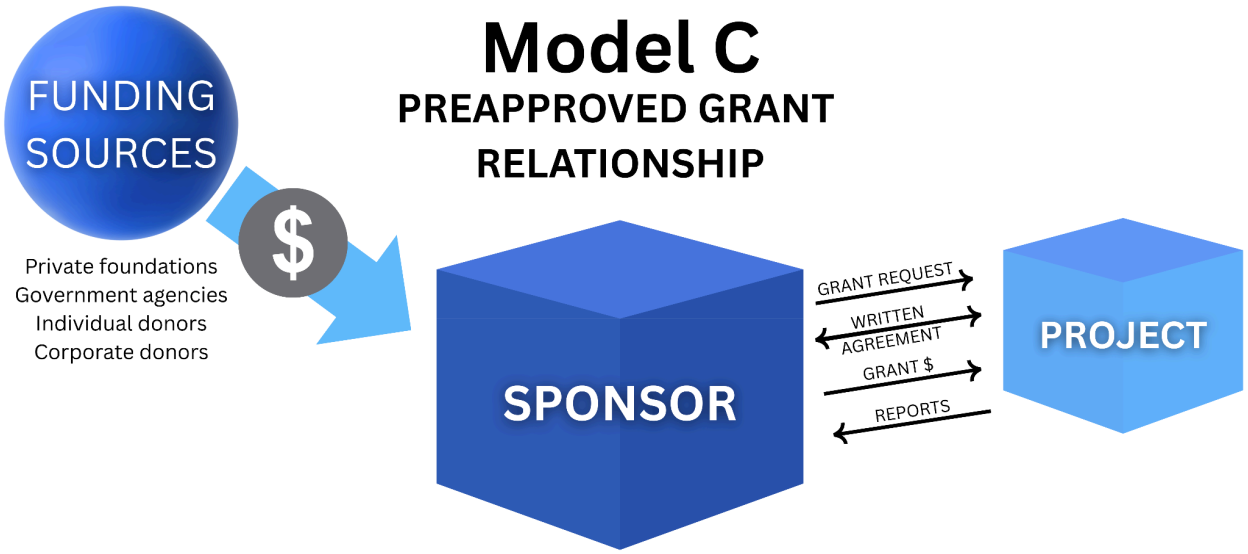


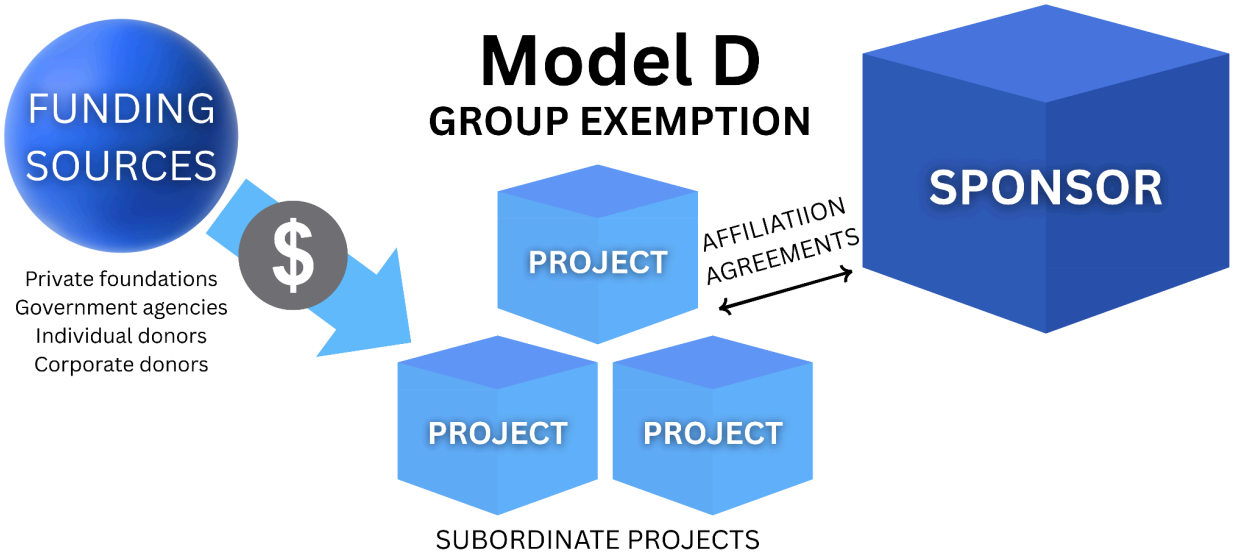
In this model of fiscal sponsorship, the project exists in-house and those conducting the project are treated as employees or volunteers for the duration of the project.



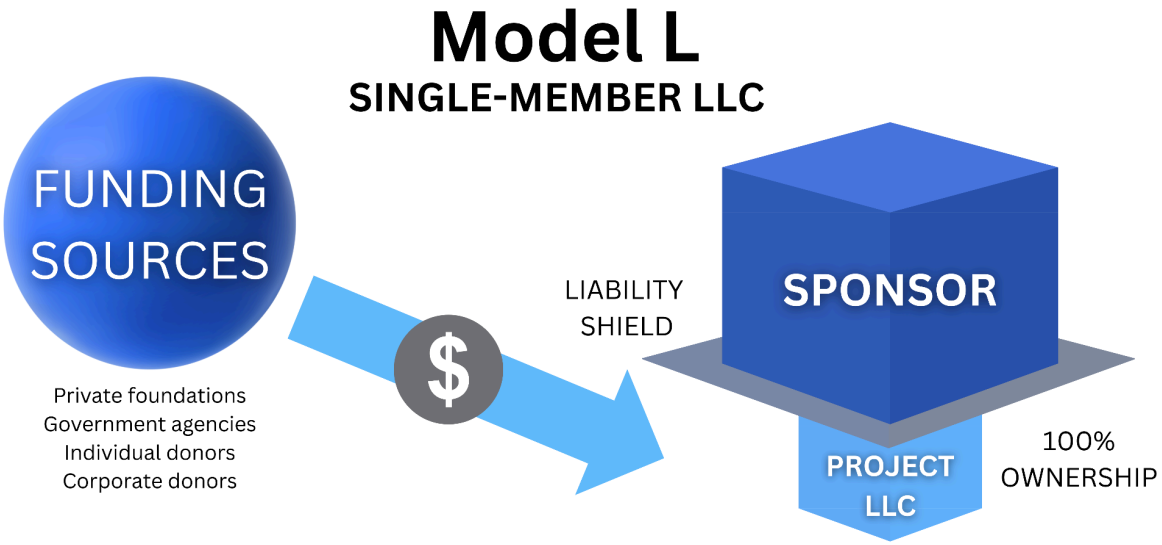
In this model of fiscal sponsorship, the project belongs to the sponsor and rather than those conducting the project being treated as employees of volunteers, the sponsor (D4C) contracts out operation of the project to a separate legal entity.



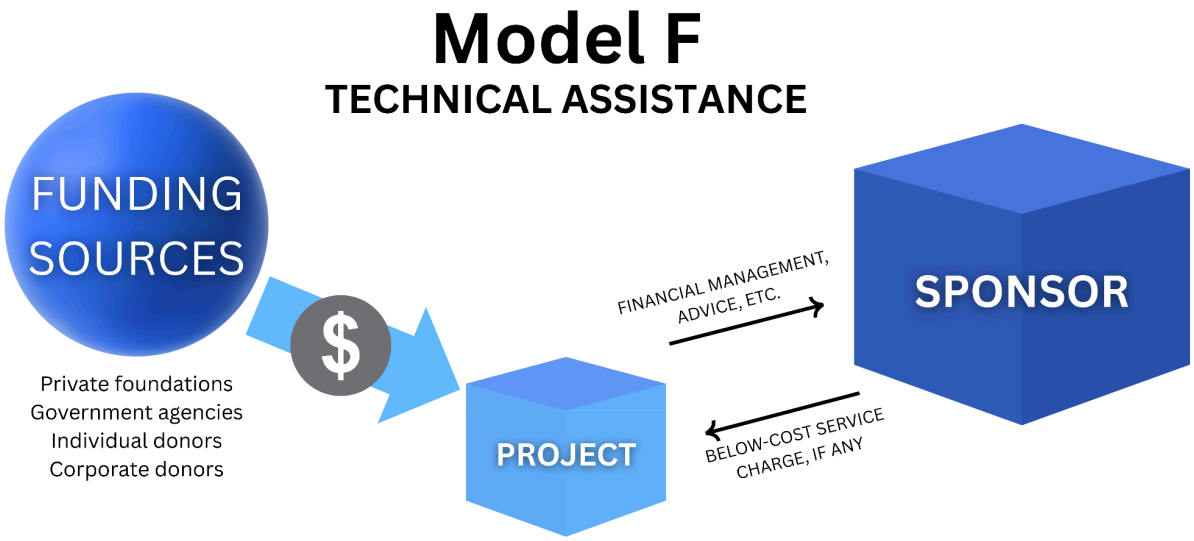
In this model, the project is a legal entity that is separate from the sponsor. Projects can be organizations waiting to acquire their own 501(c)(3) status, noncharitable entities, or people.



In this model of fiscal sponsorship, the main sponsor (D4C) draws up affiliation agreements with the sponsored projects that align with D4Cs mission and vision. D4C files a for group exemption that allows all involved to use the 501(c)(3) status of D4C.



This model allows the Sponsor (D4C) to contain part of the charitable operations with the formation of a Limited Liability Company (LLC) project offering some perks to both the sponsor and the project.



In Model F, the project might have full legal independence with its own 501(c)(3) status and relies on the sponsor to help navigate some of the administration of the project. This can include things like bookkeeping, tax assistance, IT assistance, advertising, etc.

What models of fiscal sponsorship does the District 4 Coalition offer?

D4C currently engages with multiple models of fiscal sponsorship. Many of the Neighborhood Associations we support are their own 501(c)(3) organizations and utilize the model F. Some of the Neighborhood Associations are Oregon Nonprofits and have a model C relationship with D4C. Please reach out to our Fiscal Sponsorship Manager with any questions about the different models and to get assistance on finding the model that best fits your organization.

What types of fundraising can my group do with its fiscal sponsorship?

D4C can accept on your group's behalf any grants you are awarded, as well as contributions from individuals or businesses. D4C must be named as the recipient of all funds for your group in order for them to be considered charitable. Your group will arrange for a review of any grant application or report materials at least 10 business days prior to the funder deadline. Additional guidelines related to fundraising as a D4C fiscally sponsored organization will be provided in your orientation.
We accept cash, online and check donations. Checks must be made payable to the District 4 Coalition with a note in the memo line indicating it is for your organization and, if applicable, a specific program of your organization. Memos cannot earmark donations to an individual.

Donations can either be sent directly to D4C or collected by your Principal Coordinator and then submitted to D4C.
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 D4C on a quarterly basis. The Fiscal Sponsorship 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 group's event.
Your organization is responsible for maintaining its list of donors and supporters for cultivation purposes.

What types of contributions does the IRS consider tax deductible?

Transaction	**Deductibility**
Donation of Money	**Fully Deductible:** 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.
Donation of Tangible Goods	**Fully Deductible:** When a donor gives tangible goods, the donation is tax deductible based on the donor's estimate of the item's value.
Purchase of Benefit Tickets, Auction Items, etc.	**Partially Deductible:** 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.
Donation of Services	**Never Deductible:** When a donor gives pro-bono services, the donation is not considered tax deductible according to the IRS.

Will District 4 Coalition identify and write grants for my group?

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. D4C can provide technical guidance on your application or report and is responsible for reviewing its content before it is submitted.
If D4C 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 much capacity for at this time. Be sure to subscribe to our blog, which sometimes includes funding opportunities that we have discovered.
While your group is responsible for preparing your grant proposal and report narratives and budgets, D4C must sign off on the content before it is submitted. Upon approval of your fiscal sponsorship application with D4C, you will attend an orientation and receive a handbook that covers everything you need to know about the grant application and reporting process.

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 D4C account according to the donor's wishes.

- You can raise funds for general operating support, which provides you with the greatest flexibility because your group 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 D4C, we will create an account for you within our bookkeeping system. You may have a category in your account for "general activities" for any funds with no restrictions on how they are spent. You may also have a category for any specific programs or grants that you want to track. D4C will work with you to determine the categories you wish to have in your account.

How will our group access the funds in our account with the District 4 Coalition?

All of the funds you raise for your fiscally sponsored organization will stay in your account at D4C until needed for general or program-related expenses. Your group will authorize a Principal Coordinator to submit check requests with accompanying documentation to D4C to draw on the funds in your account.

- **Reimbursement:** A check request may be submitted for authorized expenses that have already been paid by your organization, and then submitted, with receipts, by your Principal Coordinator to D4C for reimbursement.
- **Invoice:** Or your group may submit a check request along with an unpaid invoice to have D4C pay the vendor directly.

Any check request totaling $600 or more must also include a W-9 form completed by the business or individual that will receive the check. These only need to be submitted once per individual or organizational recipient, as long as there is no change to their name or contact information or tax ID number.

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

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

It can take six to nine 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 Manager to explore your options.

What Not To Do

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

No. Legally, D4C is required to ensure that donations made to your organization through D4C 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.

Can D4C pay our organization's staff through its payroll?

It depends. If your project fits into the model A type, then staff will be paid through D4C's payroll. For all other models, your organization is its own legal entity and is responsible for managing 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 group.

Can D4C write a check to my group 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. For more clarity on this, contact the Fiscal Sponsor Manager.

Can we deposit charitable donations into our own bank account if we share the records with D4C?

No. All charitable funds raised for your organization must name the District 4 Coalition as the recipient, note that the funds are intended for your group, and be deposited into your fiscal sponsorship account at D4C in order to be considered tax deductible. *Fiscally sponsored organizations are strictly prohibited from accepting charitable funds directly.*

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

No. D4C 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 Manager if your organization has already submitted a grant application and is still awaiting tax exempt determination from the IRS.

Can D4C 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. D4C 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. D4C recognizes that paying upfront then getting reimbursed can present a financial burden for some, 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 includes all required documents such as an invoice, receipts and, if needed, a W-9 form.

Before You Apply

What are the eligibility requirements to be fiscally sponsored by D4C?

To be eligible for fiscal sponsorship with the District 4 Coalition your group must:

- Demonstrate alignment with D4C's mission and vision statements
- Be located in and/or serve people who live, work, attend school and/or play in any of the neighborhoods that make up Portland's District Four.
- Not engage in activities prohibited for tax exempt organizations, such as campaigning for 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

How long does it take to become fiscally sponsored by D4C?

Depending on when you first contact D4C, and how quickly we can move through the application process together, it can take up to six weeks to become fiscally sponsored. Organizations that are well-organized and responsive to D4C 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.

How much does it cost to be fiscally sponsored by D4C?

D4C'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 D4C.
- **Tier II:** Groups with account balances under $25,000 pay a $50 annual fee in June.
- **Tier III:** Groups with an account balance of $25,000 or more pay a:
    - 10% fee on revenue from grants (other than the Community Small Grant) as it is received during D4C's fiscal year (July 1- June 30).
    - 7.5% fee on revenue from private donors or businesses.
    - No fee for revenue from D4C's own base grant
- **Temporary Fiscal Sponsorship:** please see next question.

D4C 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.

We just need a fiscal sponsor until the IRS rules on our application for tax-exempt status. How does D4C assess fees for this temporary scenario?

D4C offers a monthly pay-as-you-go fee structure for organizations that have a tax-exempt application pending with the IRS at the time they apply for fiscal sponsorship with D4C. Groups determined to be eligible for Temporary Fiscal Sponsorship will be assessed a monthly fee equal to a percentage of the funds used in your fiscal sponsorship account at D4C. The fee rate is based on the balance in your account at the start of the month:

- If your balance is less than $25,000 at the start of the month, a 7% fee will be assessed at the end of the month on the dollar total of all expenses paid from your account. Example: If your group spends $1,000 of its funds held at D4C in a month, you will be charged a $70 fee at the end of that month.
- If your balance is $25,000 or more at the start of the month, a 10% fee will be assessed at the end of the month on the dollar total of all expenses paid from your account. Example: If your group spends $5,000 of its funds held at D4C in a month, you will be charged a $500 fee at the end of that month.

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

D4C will provide you with an application template so that you can gather all the information you need before you apply. We will collect information on your group's mission, governance, programs and activities, and more.

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

Submitting an incomplete application could delay a decision by the D4C board's Executive Committee about your fiscal sponsorship status with D4C. Please provide as much detail as possible before submitting. We're here to answer your questions and reduce any barriers you may have to submitting your application.

What if we don't know who the Principal Coordinator is going to be for our group yet?

Your group will need to identify someone to serve as the Principal Coordinator - the primary point of contact between your organization and D4C. Your Principal Coordinator should be identified at the time the application is submitted. They will be required to attend an orientation with D4C staff and sign the Fiscal Sponsorship Agreement to acknowledge an understanding of fundraising and reimbursement processes before fundraising activity of any kind can begin. If you are unable to identify a Principal Coordinator, please contact the Fiscal Sponsorship Manager at D4C to discuss the possibility of moving forward with submitting your application, despite the missing element.

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 501(c)(3) 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 D4C, 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. D4C 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.
D4C's Fiscal Sponsorship Program Manager can help you determine if this arrangement is right for your group and help you navigate the next steps.

Do we need to renew our fiscal sponsorship with D4C?

Yes. Your fiscal sponsorship agreement will be valid for one year. You will need to apply for renewal on an annual basis, sign updated agreements and policies, and provide an annual summary of your group's accomplishments.

Application & Onboarding Process

Contact our Fiscal Sponsorship Program Manager

If your organization is considering pursuing fiscal sponsorship by D4C, we invite you to contact our Fiscal Sponsorship Program Manager to schedule an initial conversation to determine your group's eligibility and answer any questions you have about the process.

Complete the Application

If it seems like your group may be a good fit for fiscal sponsorship by D4C, we will invite you to complete an online application that collects pertinent information about your organization. We can provide you with a list of the application questions in advance so you can prepare your answers offline then paste them into our online form.

Get Approved

After your application is submitted and evaluated by staff, the Executive Committee of the D4C Board of Directors will consider whether to approve your application for fiscal sponsorship at its next monthly meeting.

Attend an Orientation

Understanding each of our roles and responsibilities is the first step to a successful fiscal sponsorship relationship. Once approved, D4C will work with your group to arrange time for a one-hour 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 contract with D4C.

Sign the Fiscal Sponsorship Agreement.

If your group is approved, the fiscal sponsorship relationship must be formally outlined in a mutually agreed upon contract signed by both the fiscal sponsor (D4C), and the fiscally sponsored organization (your group). A draft contract and any materials referenced in it will be provided to you for review prior to your orientation. We invite you to reach out to our Fiscal Sponsorship Program Manager if you have any questions before signing. Once your organization and D4C have signed the contract, your fiscal sponsorship may begin!
The term of your fiscal sponsorship agreement would be for one year, and it may be renewed annually. D4C will contact your group in advance of your contract's expiration date to discuss your group's successes and challenges, and share with you the renewal process so that your group has seamless fiscal sponsorship coverage.

Bookkeeping Basics

How long will it take to access our account funds with D4C?

From the time the Fiscal Sponsor Manager receives the receipt, it can take up to 14 days. For ACH reimbursements, we will reimburse directly the person who fronted the expense. For invoices, the money will go to the vendor. It is important to note that each request must be approved in writing by the person who spent the money and your organization’s Principal Coordinator. If the Principal Coordinator is the one who spent the funds, at least one other member of the organization must approve the expense. Receipts must show the amount spent and include details of what was purchased in order to be valid.

How do we access D4C's bookkeeping records for our organization?

It is important to ensure all receipts are included in the shared Google Drive folder by the 3rd day of each month. D4C will release a financial report for your organization by the 10th day of the month for the previous month. To ensure financial and operational efficiency, D4C will house

all funds of all fiscally sponsored organizations in a single account. Therefore, you will not receive a bank statement of the funds in your account.

How do we access information about our online donors?

D4C will work with you to set up a profile so that donors to your cause can make a secure, online tax-deductible gift to your group through our Give Lively account. Funds raised online for your group will be transferred into your account at D4C monthly. Please make arrangements with our Fiscal Sponsorship 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 D4C or your organization.

Can D4C provide Profit and Loss, Balance Sheet, and Budget vs Actual statements?

D4C will furnish profit and loss statements and the budget vs actuals from Quickbooks. On the 10th day of each month, D4C will generate a spreadsheet showing the fund balance report based on the data from the Profit and Loss data in D4C Quickbooks. The fund balance report will show the remaining funds after the month's activity.

What the "balance sheet" usually looks like

It's more like a fund balance report, not a full entity-level BS:

Project Fund Summary	Amount
Beginning Balance	$X
Funds Received	$X
Expenses (incl. admin)	($X)
Ending Balance	$X

We urge your organization to also generate these reports for comparison purposes and reach out ASAP should any incongruencies be found.

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, and all receipts for purchases made with the card must be submitted to D4C.

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

By law, D4C may only transfer the balance of funds in your fiscal sponsorship account to another federally recognized tax-exempt nonprofit organization. If you receive your 501(c)(3) status from the IRS, D4C 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 D4C over to your organization. Once this is complete, D4C will send your group a check for the balance in your account, less any applicable fees.

Other Roles and Responsibilities

Do we need to acknowledge D4C as a fiscal sponsor on our outreach materials?

Yes. D4C does require a minimal amount of recognition on materials as part of your fiscal sponsorship. Your group will be provided with a guiding document outlining expectations for acknowledgement once you have been formally accepted into the program.

What recordkeeping is required?

D4C and your group 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. D4C 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.

Do we need to tell D4C about our events or media inquiries?

Yes. The Principal Coordinator should notify D4C 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 D4C promptly.

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

Your Principal Coordinator must immediately notify D4C in writing should your group be considering any material changes to its purpose, scope, or activities; any change to its legal or tax status; or if your group will have a new Principal Coordinator or Secondary Coordinator.

Are we required to meet regularly with D4C once we are approved for fiscal sponsorship?

This depends on the volume of your fundraising activities and your support needs. D4C will work with your organization to establish a mutually agreed upon frequency, time and place with a co-created agenda. Either party will provide 48-hours advance notice should the meeting need to be rescheduled. If your organization's account balance reaches $25,000 or above, your group shall provide quarterly updates on program and fundraising activities to the D4C Executive Committee.

Does D4C provide liability insurance coverage for our activities?

It depends. D4C 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. In addition, your group could hold its event at D4C where indoor activities are covered through D4C's insurance policy. Please contact the Fiscal Sponsorship Manager to learn more.
D4C extends Directors and Officers Insurance to Neighborhood Associations within the district, at the discretion of the D4C Board of Directors.

Benefits of Fiscal Sponsorship with the District 4 Coalition

Knowledgeable and responsive staff

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

Access to a fundraising page exclusively for your group

D4C 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 Manager about how to get started!

Access to D4C's other programs, activities, and resources

When you become fiscally sponsored by D4C, 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 D4C 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 D4C community committee. We welcome your participation in our committees!
If your organization is a neighborhood association 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 the District 4 Coalition with supporting your organization through its fiscal sponsorship journey.

Fostering a resilient and inclusive community through collaboration, kindness, and resourcefulness. Our coalition strives for effectiveness, respect, and unity in building a thriving district.