

San Francisco Public Health Foundation

Application for Fiscal Sponsorship (SFPHF)

Introduction Welcome to the SFPHF Fiscal Sponsorship Application. Our program supports community projects with genuine charitable intent and potential for significant impact. This application is your first step towards collaboration, your responses help us align your project with our mission and values. Successful applications will progress to further review. We look forward to exploring your transformative ideas.

Review Process and Submission Deadlines Our dedicated team conducts a thorough review of each proposal, with final decisions made by the Resource Development Committee. Applicants can expect a review period of at least six weeks. We accept applications year-round.

Tell Us About Your Project

In this section, describe your project's mission, specific goals, and the activities you'll undertake. Explain the importance of your project to the community and how it will deliver tangible benefits. We are interested in both quantitative and qualitative demonstrations of community need, particularly in relation to health and well-being.

1. What's the name of your project?
2. What is the mission of your project?
3. What are your specific goals and objectives?
4. What activities will you engage in to achieve your goals?
5. What specific community gaps or deficiencies does your project address?
6. How does your project fill gaps or deficiencies currently experienced by the community?
7. What measurable outcomes will your project achieve in the community?
8. How will you keep track of your project's progress?
9. How does your project relate to health and well-being?

Your Project's Money Matters

Funding and financial management are critical to the success of any project. In this section, we explore your budgeting strategies, funding sources, and financial history. Your answers will help us gauge your project's financial viability and sustainability.

10. Have you managed money for a project or group before
11. What is your approximate annual operating budget?
12. Have you already secured funding?
 - a. If no, please provide some details.
 - i. We're interested in your strategies for securing funding, whether through grants, donations, or other methods. Where will your funding come from?
 - ii. Are there potential funders you intend to approach?

- 1. If yes, please provide some details.
 - iii. How much money have you secured for your project?
 - iv. Who are your funders? (grants, donations, and/or other)
 - v. Are any of your funding sources reoccurring?
 - 1. If yes, what are they?
 - vi. Are there any potential funders you intend to approach?
 - 1. If yes, please list each below.
13. Upload the 'SFPHF Fiscal Sponsors Applicant Budget' Excel workbook.

Keeping Things Legal and Safe

Ensuring that your project operates within legal boundaries and addresses potential risks is crucial. This section helps us understand your legal status, compliance with regulations, and your approach to managing unforeseen challenges. It's important that we align on these aspects to ensure a smooth sponsorship process.

- 14. Organized as an Unincorporated Nonprofit?
 - a. If yes, select the state: [Dropdown menu of states]
- 15. Are there any permits, permissions, or legal requirements pending for your project?
 - a. If yes, what are they?
- 16. Have you identified any challenges pertaining to a legal requirement?
 - a. If yes, what are they?

Authorized Representatives and Oversight

Who are the Authorized Representatives?

Identifying who will legally represent your project is vital for effective communication and decision-making. Please provide details about the individuals authorized to act on behalf of your project, ensuring all legal and operational decisions are managed appropriately. Who's on your team?

- 17. Who is the primary representative for the organization?
- 18. What is the title of the primary representative?
- 19. What is the mailing address of the primary representative?
- 20. What is the phone number of the primary representative?
- 21. What is the email address of the primary representative?
- 22. Is there another representative for the organization?
- 23. If Yes:
 - a. Who is the second representative for the organization?
 - b. What is the title of the second representative?
 - c. What is the mailing address of the second representative?
 - d. What is the phone number of the second representative?
 - e. What is the email address of the second representative?
 - f. Is there another representative of the organization?

- i. If Yes:
- ii. Who is the third representative for the organization?
- iii. What is the title of the third representative?
- iv. What is the mailing address of the third representative?
- v. What is the phone number of the third representative?
- vi. What is the email address of the third representative?

Who are the members of the Oversight Committee?

The Oversight Committee plays a crucial role in steering your project towards its goals. This section collects information about the committee members and their decision-making processes, ensuring transparency and effective governance. Who advises your team?

- 24. Do you have an oversight committee?
- 25. Describe the decision-making process of the Oversight Committee.
- 26. What is the name of the primary oversight committee leader?
- 27. What is the title of the primary oversight committee leader?
- 28. What is the mailing address of the primary oversight committee leader?
- 29. What is the phone number of the primary oversight committee leader?
- 30. What is the email address of the primary oversight committee leader?
- 31. Is there another oversight committee leader?
- 32. If Yes:
 - a. What is the name of the second oversight committee leader?
 - b. What is the title of the second oversight committee leader?
 - c. What is the mailing address of the secondary oversight committee leader?
 - d. What is the phone number of the second oversight committee leader?
 - e. What is the email address of the second oversight committee leader?
 - f. Is there another oversight committee leader?
 - g. If Yes:
 - i. What is the name of the third oversight committee leader?
 - ii. What is the title of the third oversight committee leader?
 - iii. What is the mailing address of the third oversight committee leader?
 - iv. What is the phone number of the third oversight committee leader?
 - v. What is the email address of the third oversight committee leader?

Making Sure Your Project Is Going Well

Operational leadership is key to your project's day-to-day management. Here, we ask about your Operations Leads and their responsibilities. Understanding their roles will help us ensure that your project is managed efficiently under our sponsorship.

33. What is the name of the primary Operations Lead?
34. What is the title of the primary Operations Lead?
35. Upload the Job Description of the primary Operations Lead.
36. Is there another Operations Lead for your project/program?
37. If Yes:
 - a. What is the name of the second Operations Lead?
 - b. What is the title of the second Operations Lead?
 - c. Upload the Job Description of the second Operations Lead.
 - d. Is there another Operations Lead for your project/program?
 - e. If yes:
 - i. What is the name of the third Operations Lead?
 - ii. What is the title of the third Operations Lead?
 - iii. Upload the Job Description of the third Operations Lead.

If Things Change

Projects evolve, and flexibility is essential. This section is designed to understand your contingency plans should there need to be significant changes or if the project needs to be discontinued prematurely.

38. What are your contingency plans if significant changes need to be made to the project or if it needs to be discontinued prematurely? Please detail any strategies for adapting or concluding the project under unexpected circumstances.

Fiscal Sponsorship Status

This section helps us understand your current engagement level in seeking fiscal sponsorship. Whether you're exclusively considering us or exploring multiple options, your transparency helps us better plan our resources and support. Kindly select no more than two that apply to your project:

39. Exclusive Consideration: This project is solely pursuing fiscal sponsorship with the San Francisco Public Health Foundation and is not in discussions with other organizations for this purpose.
40. Multiple Inquiries: Currently, this project is exploring fiscal sponsorship opportunities with organizations beyond the San Francisco Public Health Foundation.
41. Existing Sponsorship: At present, this project is under the fiscal sponsorship of another organization or university.
 - a. If so, who is your current fiscal sponsor?

Tax Exemption Status

Your project's tax status affects many aspects of fiscal sponsorship, from funding eligibility to regulatory compliance. Please indicate your current tax status to help us navigate these complexities effectively.

- 42. My project has received a determination letter of 501(c)(3) tax-exempt charitable status from the IRS.
- 43. I have applied for a determination of 501(c)(3) tax-exempt charitable status from the IRS.
- 44. I have not applied for tax-exempt charitable status from the IRS, but plan to in the future.
- 45. I do not have plans to apply for tax exempt charitable status for my project.

Who do we have to thank?

Understanding how you discovered our foundation aids us in evaluating our outreach strategies and can help us improve how we connect with potential projects like yours.

- 46. Internet Search
- 47. Social Media
- 48. Referral
 - a. If "Yes" to Referral, share the name of the person and their organizational affiliation?
- 49. Other