

**Fiscal Sponsor Organizational Profile Form**

**ORGANIZATION INFORMATION**

1. Organization Legal Name:
2. Organization Doing Business As (DBA) Name:
3. EIN:
4. Mailing Address:
5. Staff Contact Name:
   1. Staff Contact Role:
   2. Staff Contact Phone:
   3. Staff Contact Email:
6. Signatory (Please enter the most senior executive for your organization. This individual must be authorized to sign contracts for your organization. A grant cannot be made without an up-to-date signatory):
7. Year Established:
8. NTEE Code:

**ORGANIZATION BACKGROUND**

1. Provide your organization mission and vision statement. [1000 characters]
2. Briefly describe your organization's fiscal sponsorship practices to ensure good stewardship of funds. [1500 characters]
3. Is this your first time serving as a fiscal sponsor? (Yes/No):
4. If no, how many organizations are you currently serving as a fiscal sponsor? \_\_\_\_\_\_\_\_\_\_\_\_\_

**BOARD, LEADERSHIP, AND STAFF**

1. Executive Director/President/CEO Name:
2. Complete the key Leadership Team chart (e.g., CEO, CFO, and CPO) by inputting the full name, title, and a short bio (approx. 4-5 sentences) for each member of your organization’s leadership team.

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| --- | --- | --- |
| **Full Name** | **Title** | **Short Bio** |
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1. Complete the Board Member chart by inputting each Board Members full name, role on the Board, professional affiliations, and city and state of residence.

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| --- | --- | --- | --- |
| **Board Member Full Name** | **Role on Board** | **Professional Affiliations** | **City, State of Residence** |
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1. Describe your Board’s role in financial oversight of the organization.

**FINANCIALS**

1. Upload your current year’s Operating Budget to include both projected expenses and revenues
2. Upload your organization's year-to-date Statement of Financial Position (Balance Sheet)
3. Upload your organization's year-to-date Statement of Activities (Income Statement)
4. Organization Fiscal Year: start date – end date:
5. Upload your organization’s most recent Audited Financial Statement. Upload the final financial statement for the year just completed if not audited.
6. Upload your most current IRS Form 990.
7. List your revenues, expenses (categorized as program, general, administrative and fundraising), surplus, deficit and net assets.

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Year prior to most recently completed fiscal year**  (should have audit or 990 completed) | **Most recently completed fiscal year**  (does not need to be audited yet) | **Current fiscal year budget**  (entire year, not year to date) |
| Year |  |  |  |
| Audited (yes or no)0 |  |  |  |
| Revenue |  |  |  |
| Expenses |  |  |  |
| Surplus/(Deficit) |  |  |  |
| Net Assets |  |  |  |
| What percentage of administration costs for your organization’s budget? |  |  |  |

1. If there is a deficit or other major changes over the past three years, please explain why.
2. Funding sources: For the previous year, please provide the names and dollar amounts of the top five sources of funding for your organization, including government contracts, foundations, corporations, Individual donors and earned income.

|  |  |  |
| --- | --- | --- |
|  | **Name** | **Amount** |
| Source 1 |  |  |
| Source 2 |  |  |
| Source 3 |  |  |
| Source 4 |  |  |
| Source 5 |  |  |
|  | **Total** |  |

1. Does your organization use a financial management system?

-If yes, which system? (Excel, QuickBooks, Microsoft Dynamics, Odoo, Sage, SAP or other other-specify):

-No, then please describe your system for management of finances:

1. Has your organization had any instances of fraud, malfeasance, or financial mismanagement within the last five years? If yes, describe how it was managed.