Our Role vs. Your Role: Overview of Responsibilities

Reporting

Your Role:

- Provide SPF with annual written reports describing programs and services on the year anniversary of when your agreement was signed. If you have any questions about information SPF required for the report, please ask your Staff Steward for further instructions and guidance as soon as possible.
- Quarterly phone check-in with your Staff Steward.
- **Only if your project is funded by a donor or agency that requires reporting:** You must provide information and prepare all reports, including interim and final reports, for SPF's final approval at least one week before any donor deadline.

Our Role:

- Staff Steward provides guidelines and guidance for reporting throughout your project.
- Staff Steward schedules quarterly phone call.
- Staff Steward reviews and approves reports for donor-required reporting.

Fundraising

Your Role:

- All funds you raise must be processed through SPF, apart from certain types of public funding, which may be paid directly to city or county contractors. Instruct donors to send donations to SPF with your project name noted on the gift or give via your project's hosted page on SPF's website.
- Craft a fundraising strategy for your project, including management of any required reporting tasks to donors or agencies.
- Utilize fundraising services provided by SPF including: fundraising initiative toolkits, advising donors and volunteers of workplace giving opportunities, and donor data.

Our Role:

- Maintain online donation page on SPF's website and toolkits for special fundraising initiatives (such as Giving Tuesday)
- Steward donor relationships and donor engagement through gratitude events and gratitude calls
- Donor data management
- Professional donor acknowledgement and tax receipts (donor data available upon request)
- Fundraising guidance, including notification of funding opportunities and help with developing public and philanthropic fundraising strategies
- Connecting donors with enrollment in corporate giving and volunteer matching portals

Disbursements

Your Role:

- **Reimbursement**: Submit check request form to SPF's Program Coordinator with the following information: recipient of the funds, date of the transaction or service, amount requested, and purpose of the funds.
- **Vendor/Consultant/Contractor Invoices**: Submit check request form, together with all invoices, to SPF's Program Coordinator with the following information: recipient of the funds, date of the transaction or service, amount requested, and purpose of the funds.
- Provide itemized receipts clearly showing what was purchased, the date, and total amount for invoices and project reimbursements. A credit card signature receipt only showing the total does not qualify.
- If the person receiving money is an individual and not a corporation, and they will receive more than $600 in compensation for work (not in reimbursements), they will need to complete IRS Form W-9. In this case, please request a W-9 to be filled out and returned to your Staff Steward or Program Coordinator as soon as possible.
- Independent contractors must sign a written contract with you prior to performing any work or services. Keep this contract in your records for the duration of the project.

Our Role:

- Review and process reimbursements and project invoices.
- Mail out checks within 14 business days.
- Keep records of transactions and give project account balances upon request. Balance requests can take up to 3 business days.
- Operate a designated restricted account of gifts, cash, and other property for your project. These funds are subject to restrictions imposed by donors or agencies and reported in SPF's financial statements and taxes.