

Key Roles + Responsibilities

How We Partner With Fiscal Sponsees



REMINDER

The fiscal sponsor relationship between Seattle Parks Foundation and our partners is governed by our Fiscal Sponsorship Agreement (FSA). Please ensure you and your committee read the FSA carefully as it takes precedence over this guide.

This outline of key roles and responsibilities is intended to be a quick reference tool for “who does what and when” throughout our partnership. Resources on each of these topics can be found in the [Partner Portal](#).

MANAGING THE PROJECT

YOUR ROLE:

- Manage and coordinate all aspects of your project and alert your Project Liaison if you plan to engage independent contractors. A contract will be required PRIOR to the contractor’s start. See our resource ‘[Life of a Project](#)’ for a sense of different aspects of project management and coordination.



SPF's ROLE:

- If you plan to engage anyone to support your project, we can help you create a scope of work and will provide a template for the [Independent Contractor Agreement](#).
 - SPF must sign the Independent Contractor Agreement and will pay the contractor once a request for payment and invoice are submitted.
 - In some cases, the contractor will have their own agreement for the scope of work. Note that an SPF Director must review and sign the agreement as your fiscal sponsor.

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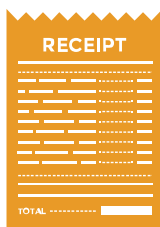
ACCESSING FUNDS

SPF will disburse funds only when there is an available balance in the account. If you have a reimbursable grant, SPF will pre-pay upon signed grant contract and submission of all invoices and receipts.

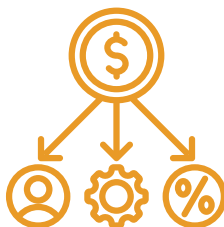
SPF prefers to make payments directly to third parties (vendors, community members, consultants, and contractors) for expenses related to a project. If there is a dispute over goods or services provided by a third party, SPF will withhold payment until the dispute is resolved.

YOUR ROLE:

- Submit requests for payment through our [online reimbursement form](#).



Include an [Itemized Receipt](#) that shows the date, item, and amount.



Include payee name + address, date of transaction, amount, and purpose.



Submit a W-9 form for payments over \$600 through our [secure portal](#). *not necessary for reimbursements

SPF's ROLE:



Establish and maintain the Account for your project.



Issue checks within 15 days of receipt of all required documentation.



Provide monthly financial report of revenue + expenses, inclusive of fiscal fees.

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REPORTING

YOUR ROLE:



Check in quarterly (or more!) with your Project Liaison.



Submit your [Annual Partner Survey](#) by February each year.



Track reporting deadlines for grants and send draft reports with 10+ business days to review.



Submit status reports for DON grants and alert your Project Liaison when a reimbursement claim is ready for review. More info [here](#).

SPF's ROLE:



Be available for periodic check-ins.



Review and approve narrative and financial reports to your grant funder.



Review and sign contracts for grants, program services, rental spaces, etc.



Track deadlines for reporting related to private grants.



Prepare and maintain financial records for your project.

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FUNDRAISING + MARKETING

YOUR ROLE:



Create a fundraising strategy for your project.



Fill out [this form](#) so we can set up your custom project and donation pages.



Get the word out about your project. Visit the Partner Portal for ideas.



Include the [SPF logo](#) in all digital and print materials.



Report on your progress to all donors, whether private or public.



Hosting an event?

1. Use this [Resource](#)!
2. [Let us know](#)!
3. [Request a Certificate of Insurance](#).



Applying for a Grant?

1. Alert your Project Liaison.
2. Give a minimum of 2 weeks' notice if support is needed.

SPF's ROLE:



Process donations, provide tax receipts, and thank every donor.



Upload donor and donation reports to the Partner Portal.



Provide toolkits and resources to support your efforts.



Promote [diverse options](#) for donor engagement and giving.



Automated notifications for online donations are available upon request.



Events:

1. Promote your event.
2. Provide a Certificate of Insurance.
3. Support planning through resources in the Partner Portal.



Grants:

1. Provide guidance and feedback on draft proposals.
2. Provide financial and organizational documentation.

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ADVOCACY + LOBBYING



The IRS and federal law restrict and regulate lobbying activities of 501(c)(3) tax-exempt organizations. Washington State has another set of lobbying regulations. As a result, SPF and our fiscal partners are strictly limited in the types of lobbying we can do.

Because of these legal requirements, you must inform SPF before undertaking any kind of lobbying activities including:

1. Attempting to influence legislation by meeting with City or County Councilmembers.
2. Engaging in political campaign activity.
3. Advocating for policy changes at the local, county, or state level.

For WA State Lobbying guidance, [visit this resource](#).

For Advocacy efforts, we do offer use of our New/Mode tool to collect petition signatures or send emails to public officials for a matter related to your project. All advocacy requests must be approved by the SPF leadership team and the campaign will be run internally by our marketing and communications team.



For more information, visit our [New/Mode Toolkit](#), [Advocacy page](#) or ask your Project Liaison.

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CODE OF CONDUCT

All individuals acting on behalf of a fiscal sponsee must conduct themselves in a manner consistent with SPF's values and charitable purposes, in compliance with SPF's policies. The Code of Conduct is in your Fiscal Sponsorship Agreement and applies to all volunteers, employees, and independent contractors associated with your project.

YOUR RESPONSIBILITIES:



Treat all people with respect and courtesy regardless of race, ethnicity, religion, gender, sexual orientation, ability, age, or national origin.



Ensure your work aligns with SPF's mission to support thriving and equitable parks and public spaces.



Fully and accurately disclose your fiscal sponsorship relationship with SPF in all contexts, both public and private.



Respect the confidentiality of all information, particularly about donors. Do not share any information with other organizations or use it to solicit support for projects not within this fiscal sponsorship agreement.



Conduct your financial affairs with integrity and honesty. This includes maintaining complete and accurate records and ensuring donations are transmitted promptly.



Notify SPF if a project may involve activities with youth or vulnerable populations. Approval must be given from SPF before any activities take place.



Do not take or use video or photography of volunteers or participants without first obtaining appropriate releases from each person or posting [photography signage](#).