

Key Roles And Responsibilities

RESOURCES ON SUPPORT AND METHODS

Overview

The fiscal sponsorship relationship between Seattle Parks Foundation (“SPF” or “we”) and Fiscal Sponsee (“you”) is governed by the contract the two parties have entered into called the Fiscal Sponsorship Agreement (the “FSA”). You (and volunteers handling any of administrative tasks) should read the FSA carefully because the FSA takes precedence over this guide and because this guide references duties that may be more fully defined in the FSA.

This outline of key roles and responsibilities is intended to be a quick reference tool for “who does what and when” throughout the life of the fiscal sponsorship relationship.

Managing the Project

Your Role:

Manage and coordinate all aspects of your project or hire independent contractors as necessary. See [Life of a Project](#) for a sense of different aspects of project management and coordination.

Our Role:

If you need a contractor, we can help you create scope of work and provide a template for the contract with the independent contractor. SPF will sign the independent contractor agreement and will pay the contractor once you submit a request for payment.



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Accessing Funds For Your Project

SPF will disburse account funds only when there is an available balance in the account. Occasionally, there will be a need to disburse funds for a project that does not yet have funds in its account (due to being funded by a reimbursement grant), in such cases you will need to alert SPF to this need, and we will approve on an as needed basis.

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

Your Role:

- Submit a request for payment through the online reimbursement form here: <https://www.cognitoforms.com/SeattleParksFoundation/partnerpaymentrequest>
 - Include documentation/receipts that are itemized and clearly show what was purchased, the date, and the total amount. **A credit card signature receipt with a total does not qualify.**
 - Include payee(s) name and address, the date of the transaction or service, the amount requested, and the purpose of the expense.
 - If the payee is an individual and or a small business and provides labor or services, (not for expense reimbursements), you must download an [IRS Form W-9](#) and submit it with your payment request, or to our secure W9 form [here](#). The payment to that person or business will be held until we receive the completed Form W-9.
- Work with your Project Liaison to create a written independent contractor agreement PRIOR to your contractor performing any work or services for your project. In some cases, the contractor will have their own agreement for their scope of work that your Project Liaison will need to review and sign. If not, fill out our vendor contract template (please ask your Project Liaison for a copy) and send to your Project Liaison for approval and signature.



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Accessing Funds For Your Project (cont.)

Our Role:

- Establish the Account for your project and maintain accurate and complete records of monies received and disbursed attributable to that Account. Funds allocated to the Account are subject to any restrictions imposed by donors or agencies and will be reported in SPF's financial statements.
- Review and process your reimbursement requests and project invoices; write checks and mail them out within 10 business days of receipt of all required documentation in support of request.
- Provide monthly or quarterly reports of financial activity of both revenue and expenses.
- Outside of the regular quarterly reports, provide ad hoc project account balances requests within 5 business days of the request.
- Assess fiscal fees to partner accounts on a quarterly basis. If there are not enough funds in the project/grant/subaccount, SPF will charge the fees to the "General Fund" of the Partner account (the general fund is the account where unrestricted donations are credited to the partner account vs. a restricted fund which is generally a reimbursement grant account).



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Reporting

Your Role:

- Check in at least quarterly with your Project Liaison; if your project is quite active, check in more often. Phone calls, emails, or the [quarterly check in](#) form can be used for this purpose.
- Submit your annual [Partner Survey](#) by January 31st of every year.
- If your project is funded by a grant that requires you to report periodically, we need to see and review your draft report at least 10 business days before it is due to the funder. (This is not the case for Neighborhood Matching Fund Grants, as those status reports are submitted without the need for SPF's approval).

Our Role:

- Ensure that the Project Liaison is available for the periodic check-ins with you.
- Review and approve your reports to a funder of your reimbursement grants. (In some cases- we will submit grants reports on your behalf, though this is not always the case).
- Review and sign contracts for grants, independent contractor services, etc.
- Track deadlines for reporting related to private grants.
- Prepare and maintain financial records relating to the project according to Generally Accepted Accounting Principles; retain and make records available to auditors as required by law.



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Fundraising And Communications

Your Role:

- Create a fundraising strategy for your project. Please consult the FSA section on “Fundraising” to make sure you understand your responsibilities and you know what types of fundraising are not permitted (for example, crowdsourced/peer-to-peer platforms such as “GoFundMe” are prohibited, but SPF has an alternative tool, if interested, contact your Project Liaison for more information). Your strategy should include how you plan to manage any required reporting to donors or agencies.
- **Fiscal Sponsee will include in all solicitations of donations the following disclosure:** “In circumstances when honoring your designation is not possible, Seattle Parks Foundation may use your gift for other Foundation-charitable purposes.”
- Instruct donors to send donations to SPF with your project name noted on the gift. Alternatively, donors can give online through your project’s hosted page on SPF’s website.
 - Options for donating through SPF website are Credit Card, Google Pay, Venmo, Paypal and Bank Transfer **(this list subject to change at any time per our Classy donation platform)**
- Make use of SPF’s fundraising resources such as toolkits and donor information.
- Create a timeline/schedule of the deadlines for upcoming grant applications. If you need any documentation, letters of support or want feedback on your grant proposal, you need to contact your Project Liaison for help at least three weeks before the grant deadline.
- Check your webpage occasionally to be sure it’s current. If updates are needed, fill out the [Partner Page Update form](#).
- If you need a Certificate of Insurance as part of hosting an event or for a grant, you will need to submit a request for the certificate through [this form](#) at least 30 days in advance of when you need the certificate.
- If you want help advertising your events, contact your Project Liaison at least two weeks before each event and describe the help you want.
- Include [SPF’s logo](#) in materials such as flyers, invitations, webpages, etc. with the language: A Fiscally Sponsored Project of Seattle Parks Foundation.



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Fundraising And Communications (cont.)

Our Role:

- In a timely way, process donations, provide acknowledgement letters and tax receipts to donors.
- Steward donor relationships and donor engagement through gratitude events and gratitude calls.
- Maintain online donation page on SPF's website for your project.
- Provide reports and updates on donor activity; if there is no activity, donor reports are not updated.
- Provide toolkits for special fundraising initiatives, such as GiveBIG.
- Provide fundraising guidance, which can include information about funding opportunities and advice for your fundraising strategy.
- Inform donors about matching corporate giving and volunteer portals.
- Provide guidance and feedback on draft grant proposals.
- Provide financial and other documentation needed for grant applications.
- Publicize your project's community event opportunities through our social media network.
- When requested, provide a Certificate of Insurance for your event (we need at least 30 days' notice).
- With at least 30 days advance notice of your fundraising event(s), we can assist you with:
 - Review of invites/ads/promotions before they are publicized
 - Brainstorming event venues, fundraising ideas, and event timelines
 - Event registration of ticketed events
 - Promotion of your event via social media channels (Facebook and/or your webpage on SPF's website)



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Advocacy/Lobbying

Your Role:

- The IRS and federal law restrict and regulate advocacy and lobbying activities of 501(c)(3) tax-exempt organization. As one of those organizations, SPF is strictly limited in the types of advocacies and lobbying we can do. That means you, too, are strictly limited in these areas of activity.
- Because of these legal requirements, **you must inform SPF before undertaking any kind of lobbying activities.**
 - These include (i) attempting to influence legislation by meeting with City or County Councilmembers, (ii) engaging in political campaign activity, and (iii) advocating for policy changes at the local, county, or state level. This is not an exhaustive list.
 - For more information see: <https://nonprofitquarterly.org/advocacy-lobbying-501c3-charitable/>



SEATTLE PARKS FOUNDATION



For more partner resources, please visit:

<https://www.seattleparksfoundation.org/resources-for-partners/>