

# Application: Request for Fiscal Sponsored Project or Program Support

## Introduction

**Hello, Peter Parker**

Welcome to the Request for Fiscal Sponsored Project or Program Support. We appreciate you taking time to complete this form, and we are looking forward to learning more about your work in the community. Please note, an invitation to complete an application is not a guarantee of funding.

- **Complete the organizational pages with the organizational and financial information of the fiscal sponsor.**
- **Complete the project/program information pages from the perspective of the sponsored project/program.**

### Tips for Submitting an Application Form

- All entries marked with \* are required.
- Be clear and concise, as we do not evaluate inquiries based on the length of your responses.
- Feel free to use bullet points as you answer questions.
- Feel free to copy and paste language you have written for other proposals if the information remains accurate.
- You may upload additional supporting information to share more about your work.

If you have any questions about the system, email [grantsupport@houstonendowment.org](mailto:grantsupport@houstonendowment.org). If you have questions about the content of your application, email your primary contact at Houston Endowment.

## Fiscal Sponsor Information

\*Legal Name

Doing Business As

\*Federal Tax ID (EIN)

\*Tax Exempt Status: *Note: If tax exempt status is "Other," you will be asked to provide additional details.*

\*Year Founded

Mailing Address (\*Address Line required)

\*Phone Number

\*Email

Website

\*Mission

\*Please summarize your organization's work.

\*Please upload documentation evidencing your fiscal sponsor/sponsee relationship.

*This may include fiscal sponsorship contract, letter of engagement, executed Memorandum of Understanding, etc.*

## Contacts

*Note: Contacts on file will display, and the user will select the existing contact (Use this response) or edit/add new contacts and then select the updated information (Use this response).*

\* Primary Contact for this Work: *Note: Enter just one contact as the primary contact for this request.*

\*Fiscal Sponsor CEO/Executive Director/President: *Note: Enter just one contact here.*

\*Fiscal Sponsor Finance and Accounting Contact: If request is approved, Houston Endowment will follow-up with this individual to set-up payment details. *Note: Enter multiple contacts, if possible, to be notified of upcoming payments.*

Other Request Contacts: Please add additional individuals to be included on application or reporting communications. *Note: If no additional contacts are added here, the Primary Contact for this request will receive report and application notifications.*

## Fiscal Sponsor Financial Information

\*Fiscal Year Ending:

Budget Summary *Note: Enter at least one and no more than three years.*

*Revenue	*Expenses	*Assets
*Liabilities	*Unrestricted Net Assets	*Data Source

\*Upload Organization Operating Budget

\*Upload your most recently filed IRS Form 990 or other relevant financial statements.

Upload any other financial documents you would like to share.

Examples: Income Statements, Profit and Loss Statements, Balance Sheet

## Project/Program Work

*Please complete the project/program information pages from the perspective of the sponsored project/program.*

*Please provide brief answers, when possible.*

\*Name of Fiscal Sponsored Project or Program

\*Total Cost of Proposed Project or Program

\*Total Requested Amount from Houston Endowment

\*How many years of support are you requesting?

\*Year 1 Amount

\*Please describe the project or program work associated with this application.

\*What opportunity and/or challenge are you addressing?

\*How does this opportunity and/or challenge affect the people of Greater Houston?

\*Which two or three groups working in Greater Houston are most similar to yours? What do you have in common and what sets you apart?

\*Provide a brief description of the project or program goals.

\*What measurable milestone(s) do you expect to achieve?

\*What specific metrics will you monitor to determine whether your organization is on track to achieve these project or program goals?

\*What opportunities and/or challenges may impact achieving these project or program goals?

\*Describe the stakeholders and community partners engaged in this project or program.

\*Voter Registration Activities

As a private foundation, Houston Endowment is subject to specific rules governing voter registration activities and support, as outlined in Internal Revenue Code Section 4945(f) and related regulations. More information can be found at [www.irs.gov/charities-non-profits/private-foundations/influencing-elections-and-carrying-on-voter-registration-drives](http://www.irs.gov/charities-non-profits/private-foundations/influencing-elections-and-carrying-on-voter-registration-drives) and [learnfoundationlaw.org](http://learnfoundationlaw.org). Please include whether any project/program activities include funding or conducting voter registration activities [and whether you have a 4945(f) ruling from the IRS]. If none, indicate in the space below.

Please answer the following questions if your organization has less than 20 team members.

Number of:

Paid Full-Time Staff

Number of Paid Part-Time Staff

Number of Volunteers

## Project or Program Budget Information

\*Upload Project/Program Budget

**Lobbying Activities:** Internal Revenue Code Sections 501(h), 4945(d)(1) and 4945(e) and related regulations define lobbying as carrying on propaganda, or otherwise attempting to influence legislation. More information can be found at [www.irs.gov/charities-non-profits/lobbying](http://www.irs.gov/charities-non-profits/lobbying) and [www.learnfoundationlaw.org](http://www.learnfoundationlaw.org). Please include in your project budget a line item for lobbying activities as defined in the Internal Revenue Code, and include the monetary amount designated for such

activities or note "0" if the project does not include any such activities. If you do not indicate a lobbying line item and amount, we will assume there are no lobbying costs associated with this project/program budget.

**\*Budget Narrative**

The purpose of the budget narrative is to supplement the information provided in the submitted budget. The budget narrative is a tool to help foundation staff understand the budgetary needs of your organization and is an opportunity to provide descriptive information about the costs, drivers, and risks that may not be easily communicated in the budget.

Please provide a breakdown of projected and committed sources of income for the organization.

**Projected**

\*Foundation Support

\*Corporate Contributions

\*Individual Gifts

\*Governmental Support

**Committed**

\*Foundation Support

\*Corporate Contributions

\*Individual Gifts

\*Governmental Support

\*Please list the project or program's highest contributors and amounts (up to ten).

\*If the request is approved, how will the work be sustained after HEI's commitment ends?

### [Additional Information and Confirmation](#)

*Optional: Use this page to share any additional information and documentation with our team.*

**Additional Information**

**Additional Documentation Upload**

**Confirmation Statement**

In order to protect the integrity of the grantmaking process, Houston Endowment respectfully requests refraining from contacting board members regarding inquiries. Houston Endowment policy requires board members to refrain from participating in site visits, or otherwise engaging with organizations regarding pending inquiries.

\*This application is true and accurate to the best of my knowledge. I am authorized to submit this information on behalf of this organization.

\*Submitted by

