

WILLIAM JAMES ASSOCIATION

Fiscal Sponsorship Program

WHAT WE DO

The William James Association is a non-profit community service corporation operating under Section 501(c)(3) of the IRS tax code. WJA promotes work service in the arts, environment, education, and community development. Since its inception in 1973, the William James Association has developed a variety of programs engaging individuals in meaningful work that address unmet community needs.

Through its **Fiscal Sponsorship Program**, the William James Association assists individuals and community organizations consistent with its service mission by providing administrative support, tax-exempt status, and fiscal sponsorship. The purpose of the William James Association Sponsorship Program is twofold:

- Provide managerial support and guidance to individuals and organizations so that they may produce temporary projects or begin to develop as ongoing organizations.
- Ensure funding agencies and contributors that funds are well-managed, spent according to their guidelines, and that proposed services are delivered.

As a fiscal sponsor, the William James Association can provide:

- Sponsorship of grant applications and administration of grant funds through a pre-approved grant relationship.
- Formal acknowledgment to funding sources and monitoring of expenditures to ensure that they are in keeping with the original proposals, contracts, or funding letters.
- Staff consultation on writing of grants and final reports to funders (sponsored party is responsible for actual writing of all materials).

The sponsored project remains a separate legal entity that is liable for its own taxes, insurance and debts.

Both temporary projects and developing organizations can be considered for fiscal sponsorship. Sponsored affiliates of the William James Association have included Poetry Santa Cruz, Growing Cycles, [producer's of the play] *John Brown's Body* at San Quentin State Prison, and the Probation Internship Program.

In order to receive sponsorship, projects must be approved by the William James Association Board of Directors. Applications are welcome at any time, with the understanding that they are reviewed at regularly scheduled board of directors' meetings.

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Fiscal Sponsorship Program Application Instructions

APPLICATION PROCEDURE

The William James Association Board of Directors reviews projects seeking sponsorship on a quarterly basis. Applications are accepted any time up to two weeks before the quarterly board meeting.

Projects will be considered for sponsorship if they are:

- Compatible with the William James Association mission and serving community needs
- Upholding standards of excellence as relevant to their area
- Serious in intent and well-planned
- Responsible about proper reporting to funding sources and the IRS
- Non-legislative and otherwise consistent with the William James Association's tax-exempt status.

Questions? Call (831) 426-2474 or e-mail wja@cruzio.com

MORE LOGISTICS

Are any fees involved?

In addition to the initial \$25 application fee, the William James Association retains an 8% annual administrative fee on all income transacted under our non-profit umbrella. A transaction fee may apply to each deposit or check written. Payroll services are also available with a fee (see below).

What about liability insurance?

All projects up for sponsorship will be assessed for the necessity of liability insurance by the William James Association's insurance agent. If liability insurance is deemed prudent, the sponsored party would need to agree to incur this additional expense.

What if the Sponsored Project needs to pay individuals for rendering services?

When applicable, the Sponsored Party would enter into Independent Contractor agreements with individuals receiving compensation for their services. If such individuals do not meet the criteria as an Independent Contractor, the Sponsored Party would agree to treat them as an employee and must legally satisfy all legal obligations therein. If the Sponsored Party is unable to meet these obligations, the Sponsored Party's employees would be treated as William James Association employees. If conditions of employment are not provided in writing, William James Association personnel policies would be applied. All expenses incurred by William James Association for Sponsored party employees, including the work of William James Association's administrative staff, would become an expense of the Sponsored Party.

What other responsibilities does the Sponsored Project carry?

Besides reporting to the IRS and preparing reports required by funding organizations, the Sponsored Project will need to submit periodic progress reports to the William James Association. The **Fiscal Sponsorship Agreement** between the sponsored project and the Association will clearly delineate these and any other responsibilities.

WILLIAM JAMES ASSOCIATION

Fiscal Sponsorship Program Application

Organization/Project Name: _____

Organization/Project Director: _____

Address: _____

City/State/Zip: _____

Phone: _____ Fax: _____ Email: _____

Social Security or Federal Employer Identification Number (FEIN): _____

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1. Brief Summary of Project Description for one year (please attach a longer 1-3 page project narrative).

2. Who are the principal individuals involved in the project? (please attach short bios/and or resumes for key personnel).

3. Where do you plan to get funding? Please list steps you've taken and any preliminary responses so far.

4. Please fill out and turn in a Sample Budget (see attached) with this application.

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A nonrefundable \$25 processing fee made payable to The William James Association must accompany this application. Submission of this application does not guarantee sponsorship.

Return completed application to: William James Association
P.O. Box 1632
Santa Cruz, CA 95061