

THE LEARNERS LAB (TLL) FISCAL SPONSORSHIP APPLICATION

The Fiscal Sponsorship Application Cycle Is Open for 2017.

The Learners Lab (TLL) is a public foundation staffed by volunteers that design, manage, and operate a portfolio of Charitable & Fiscal Sponsorship programs. Our mission is to develop, acquire and provide access to free and discounted professional development training, help future tax exempt entities become established, and help young tax exempts launch & mobilize their operations.

As a start-up of volunteers, so we know first-hand the challenges and other shortfalls that exist when pursuing status as a tax exempt entity; our own journey was far many too years in the making. Therefore, in addition our charitable programs, **The Foundation** serves as a fiscal sponsor for qualifying entities pursuing their tax exempt status their 501(c)(3), are in the initial/early stages of their tax exempt status but less than 2 years old. **TLL does not award funding grants of any kind.**

The Learners Lab is building a network of partner and mentoring resources to help us help minimize as many of those hurdles as is possible. While we are just getting started ourselves, there's plenty of support we can deliver and/or facilitate. Our program efforts are customized to the specific needs of each entity applying for fiscal sponsorship.

Because of the prevalence of fraud, Applicants will be thoroughly vetted before a fiscal sponsorship is awarded. (Initial) _____

FISCAL SPONSORSHIP PROGRAM & PROCESSES

TLL's Fiscal Sponsorship Program application process consists of three steps: (a) application submission, (b) review (interviews if required), & selection notification, and (c) awardee welcome & formal registration into the program. Part of the review phase includes assessment and research for the delivery of the requested service. Where required, that will include securing outside resources to partner with us or deliver on their own, the technical assistance you require.

Because each applicants needs and the solutions to those needs are unique, applications to **The Foundation's** Fiscal Sponsorship Program have a nominal, non-refundable application fee to help off-set the costs of processing and vetting submissions, see the fee schedule below. **The Foundation's** official Registration process includes a flat, one-time fee of \$500 setup for Categories 1, 2, & 3 registrations, and \$250 for Category 4 registrations to off-set programmatic and compliance costs, and the balance is put towards securing initial resources to launch the applicants program.

Fiscal Sponsorship program runs a consecutive 6-24 months - (2-years). In fairness to other applicants, there are no program renewals. Our goal is to help every applicant. However, accepting the application is not an automatic invitation or approval to participate nor does it guarantee admittance.

Program Application Fees

The Application fee for **TLL's** Fiscal Sponsorship program ranges between \$250-450. Qualifying categories are as follows:

- Category 1: Entities Pursuing Tax Exempt Status But Not Ready to File, \$450
- Category 2: Entities Ready to File to for Tax Exempt Status But Requiring Additional Assistance, \$350
- Category 3: Entities With a F1023/1024 Application Pending Before the IRS, \$300
- Category 4: Entities (With or Without Tax Exempt Status) Wanting Only Grant/Donation Processing, \$250

Fiscal Sponsor opportunities are only granted for US entities pursuing or recently granted status as a US tax exempt entity (charity, nonprofit, foundation, association, other designation as defined by the Unites State Internal Revenue Service (IRS). Feel free to visit the IRS website at www.IRS.gov for clarification on its definition of a tax exempt entity.

TELL US ABOUT YOUR FORTHCOMING ORGANIZATION

For Clarity, Type Written Responses Only

1. **Your Name & Title:**

2. **Your Preferred Contact Info (Mailing Address, Phone, Email (only one please):**

3. **The Organization Proposed Name & Tax ID#:** *(If you have no tax ID/EIN , call 800 829 4933 or apply online at www.IRS.Gov, its free)*



4. **Name and Title of Other Key Players (if any).** (Volunteers, officers, interim/acting officers, potential board member, staff; if NONE, enter TBD (*to be determined*)):

5. **Location of Proposed Operations (city, state; indicate if operations will be national):**

6. **How did you hear about The Learners Lab (TLL)?**

7. **If approved by the IRS, what type of tax exempt entity will your organization be?**

- Association Charity Church/Religious Org Education Institution
 Non Profit Private Foundation Public Foundation Political Organization

8. **Have you completed your IRS Form 1023/1024 application for tax exempt status?**

- Y N In Progress

9. **If not, is that something we need to help you with?** Y N

DESCRIPTION OF YOUR WORK

Please keep responses within the space allotted. Concise, direct answers no details are needed, give just enough information to make your case. If approved, you can elaborate more on the **TLL Fiscal Sponsorship Registration Form** which is how we will develop the particulars of your fiscal sponsorship program and supporting assets. All we require now is a well-crafted outline or summary.

Summary

Provide an outline on the basic mission of your organization and how you plan to achieve its goals. Include who, what, why, where, when and how. This is your elevator pitch, we should be able to absorb and comprehend your purpose and activities quickly.

What You Need

Our goal is to assist and support the pre-startup thru start-up phases of US based tax exempt entities. Tell us...

1) **Why your organization necessary, what made you decide to start it, and why will it be successful?**

2) **What is your background, relevant experience, and how are you contributing to this new entity?**

3) **What have you already done to accomplish your goal of achieving tax exempt status? How far along are you in that process, and what additional "non-financial" assistance do you need from The Learners Lab?**

4) **From an operations perspective, how will the organization function?** (Explain what you plan to do, whether or not you're already begun, when is your start anticipated, who will be helping, who you'll be serving, and how will you reach them?)

5) **What type of operational infrastructure will your organization need in order to run?**

6) **Do you require assistance in developing the operational infrastructure for your organizations planned department? If so, do you need assistance with any of the following? Check all that apply:**

- a. Organizational Chart, Governance and Overall Business Unit Development []
- b. HR Department and Infrastructure Development []
- c. Finance Department and Infrastructure Development []
- d. Financial Management, Grant Administration and Project Accounting []
- e. Technology Department and Infrastructure Development []
- f. Programmatic Development, Professional Development Training Department/Program/Materials []
- g. Industry/Service Specific Policy Development []
- h. Other type of assistance not mentioned []
- i. Tell us what you have in mind, and what type of mentor/partnerships would be helpful:

7) **Why are you passionate about this project and why should we feel the same?**

8) **What else do we need to know about your organization? What other people, entities, organizations are already aware of you and the work you plan to undertake?**

BUDGET, EXPENDITURES & OTHER FINANCIAL INFORMATION

1. **How much have you raised /contributed and expended thus far in establishing your organization, including use of your own personal funds?** If more space is needed, leave the chart blank and attach a separate ledger of expenditures.

AMOUNT	What Funds Were Spent On	Source of Contribution Funds (Circle all that apply)
\$ 0. 00		[<input type="checkbox"/>] You [<input type="checkbox"/>] Someone Else [<input type="checkbox"/>] A Group or Organization
\$ 0. 00		[<input type="checkbox"/>] You [<input type="checkbox"/>] Someone Else [<input type="checkbox"/>] A Group or Organization
\$ 0. 00		[<input type="checkbox"/>] You [<input type="checkbox"/>] Someone Else [<input type="checkbox"/>] A Group or Organization
\$ 0. 00	Amount of grant(s)/donations expected/anticipated by (MM/DD/YY):	[<input type="checkbox"/>] You [<input type="checkbox"/>] Someone Else [<input type="checkbox"/>] A Group or Organization

1. In what ways will your organization generate revenue to sustain itself that ARE NOT donor reliant? Check all that apply.

- Membership Dues Technical Assistance Special Services Events
- Other: (briefly summarize below)

FISCAL SPONSORSHIP APPLICATION FEE AND PAYMENT INFORMATION

TLL accepts Cashier’s Check or US Postal Service Money Orders as payment for Fiscal Sponsorship Application fees. The application fees categories are as follows: (Check only one)

- a. Entities Pursuing But Not Ready to File for Tax Exempt Status \$450
- b. Entities Ready to File for Tax Exempt Status But Require Some Additional Assistance First \$350
- c. Entities With a F1023/1024 Application Already Pending Before the IRS \$300
- d. Entities (With or Without Their Tax Exempt Status) Wanting Only Grant/Donation Processing Services \$250

APPLICATION SUBMISSION PROCESS

An application payment form is available by download from http://TheLearnersLab.org/docs/fillable_FSPaymentForm.pdf. Please include it with your application fee as “Proof of Payment” when submitted. Applications submitted without the application fee and the application fee payment form will be considered incomplete and will not be processed.

Your application, application payment form and application fee will be processed by our Finance Department. Processing will auto-generate all Receipt Numbers. The Receipt Number will be entered on your payment form as part of the record, and this final copy will be returned as receipt and acknowledgement of your payment.

Applications accepted via email, and via snail mail.

- Submissions via email should be scanned and sent to: FSponsors@TheLearnersLab.org, Attn: Fiscal Sponsorship in the subject line, and include your Fiscal Sponsorship Application and the Application Payment Form.

Payments accepted using these methods:

- Hard Copy By Mail as Cashier’s Check
- Hard Copy By Mail as US Postal Money Order

Make payable and Submit Application To:

The Learners Lab (TLL) Tax ID 45-5222602
A Public Foundation
6511 Princess Garden Parkway
Collamore Bldg., #202
Lanham, MD 20706

Attn: Fiscal Sponsorship Application for [Your Organization’s Name]

**PLEASE SAVE & PRINTOUT APPLICATION
Then Initial, Sign & Date as indicated on Page 5.**



By submitting this application, you are confirming that you have approved all of its contents and that they are truthful.

You are also confirming that (unless you clearly specify otherwise directly in this application form), you are allowing TLL to share the contents of your application (but not your contact info) on our website, social media, with outside media and with the general public for the purposes of assisting you and your organization to achieve the goals outlined for your organization within this application, and later as a demonstration of our work and commitment to helping our peer start-up in their pursuit of tax exempt status, details to be articulated upon an award in our *Fiscal Sponsorship Program Registration Package*.

Please Initial to Acknowledge Submission Terms

APPLICATION DISCLAIMER & TERMS

The Learners Lab (TLL) Does Not Issue or Make Grant Awards of Any Kind.

This application is NOT for the receipt of grants or direct/indirect funding of any kind, or the management of non-financial assets. Therefore, if your need requires funding, your team should pursue the appropriate channels to achieve that goal.

Please Initial to Acknowledge Funding Disclaimer

PLEASE NOTE THE FOLLOWING:

This application is NOT an invitation by TLL for fiscal sponsorship and should not be construed as an automatic entry into The Foundation's Fiscal Sponsor Program. This application is for qualification purposes only, and to convey the criteria with which TLL engages those interested in obtaining a fiscal sponsorship for their current or [future] tax exempt entity.

The *TLL Advisory Council (TLLAC)* meets throughout the year, but commences programmatic participation on a cyclical basis as awardees complete their program. TLL ALWAYS reserves the right to FORGO a new application cycle, extend the application period, or offer a Fiscal Sponsorship(s) to applicants that have already applied.

Application availability will be announced through print & web media, postings on the TLL website, and accepted at least one quarter of each calendar year. The *Advisory Council (AC)* will process and review applications throughout the application cycle and "after" the applications period had ended as needed, and will notify all applicants of their disposition "once the entire review process has concluded."

Because our fiscal sponsor services are unique and customized to each awardee, the number of Fiscal Sponsorships awarded depends heavily on the requested services, the availability and replenishment of funds, staff, partners, and other resources.

Please Initial to Acknowledge Applicant Status Disclaimer

Submission:
(Hand written only, electronic signatures not accepted)

Authorized Signature Date

Title of Signatory

Your Proposed Organizations Name

