



The Emery Ed Fund mobilizes local and regional resources to bring increased funding, innovative programs and strong partnerships to Emeryville's public schools.

Emery Ed Fund Fiscal Sponsorship Guidelines and Procedures

I. Application Process

- A. Each applicant must write and submit a project proposal that should include the following information:
 - 1) Brief description of the sponsored school/club/group/project, including its purpose.
 - 2) Description of the mission, goals, objectives, and strategies.
 - 3) Explanation of how the school/club/group/project aligns with the overall mission and goals of the Emery Ed Fund and Emery Unified School District.
 - 4) Description on how funds will be raised and what types of programs are planned to achieve stated mission, goals, and objectives.
 - 5) Annual or project budget with major costs broken out.
 - 6) Name, address, and telephone number(s) of project director(s).
 - 7) Signed authorization from appropriate school/district leadership.
- B. The Fund's Board of Directors and Staff will review and evaluate each proposal using the following criteria:
 - 1) Alignment to the mission, goals, and objectives of the Emery Ed Fund and Emery Unified School District.
 - 2) Innovativeness of strategies and programs.
 - 3) Projected revenues and costs.
 - 4) Resource impact to the Emery Ed Fund.
- C. The organization/group/project will be notified in writing whether the proposal has been accepted along with the agreement to be signed by the applicant and returned to the Fund within 60 days.
- D. The Executive Director of the Fund will sign the agreement and provide a copy to the new sponsored organization/group/project.

II. Fees and Services

- A. The Emery Ed Fund charges a sliding scale for fiscal sponsorship fees.
 - 1) School/Club/Parent Organizations: 0% service fee on revenues earned.
 - 2) EUSD initiated and submitted proposals: 5% service fee.
 - 3) Emery Ed Fund initiated and submitted proposals: 10% service fee.

- B. At the end of each fiscal quarter, the Fund will evaluate the resource and cost impact the Fund for the sponsored organization/group/project. If the Board of Directors decides that the impact is more than anticipated, the Fund may request an additional service fee.
 - 1) If the impact is deemed more than anticipated, the project director(s) will be contacted and will meet with the Board of Directors and/or the Fund's Executive Director to discuss and negotiate the appropriate additional service fee.
 - 2) Upon agreement that an additional service fee shall be charged, the Fund and project director(s) in the name of the school/club/group/project will sign an addendum to acknowledge the additional fee and the additional services to be provided.

- C. Should additional services be requested by the school/club/group/ project, the Fund reserves the right to charge an additional service fee.
 - 1) The Board of Directors and the Fund Staff will decide on whether to provide such additional services. If the services are to be provided, the project
 - 2) director(s) will meet with the Fund's Executive Director to discuss and negotiate the appropriate additional service fee.
 - 3) If the request occurred prior to execution of the agreement, the agreement will be modified by the Fund indicating the additional service fee and the additional services to be provided. If the request was made by and granted to an existing sponsored organization/group/project, the Fund will write an addendum detailing the additional services and the additional service fee.

III. Donations and Disbursement Policy

- A. Donations and Fundraising
 - 1) The sponsored school/club/group/project must keep the Fund apprised of fundraising efforts.
 - 2) All donations must be made to the Emery Ed Fund. Regardless of payment form, the donor must provide a note or memo indicating the sponsored organization/group/ project for which the money was donated. Failure to do so will result in donations being deposited into the Fund's general accounts.
 - 3) Copies of letters of acknowledgement provided by the project director(s) must be submitted to the Fund within a one (1) week of receipt of the donation.

- B. Disbursement and Transfers
 - 1) The Fund will not disburse any funds without the express, written consent of the project director(s), as documented in the fully-executed fiscal sponsorship agreement. Original documentation of all expenditures must be received by the Fund prior to any payment is made.
 - 2) Fund transfers require express, written consent of the project director(s) and note the amount to be transferred and the appropriate accounts.

- C. Project End and/or Inactivity
 - 1) In the case that the organization/group/project becomes inactive – no income or authorized disbursements for one (1) year – or ends and there is unused, remaining funds, the Fund will notify the project director(s) within a week of the inactive status or end or end of the organization/group/project.
 - 2) A month after notification, should the project director(s) not designate how such funds are to be used, the Fund's Board of Directors can reserve the right to designate the unused, remaining funds to a purpose that the Board of Directors deems closest to the donors' original intentions.

IV. Change in Project Director(s) and Budget

- A. If the sponsored organization/group/project changes project directors, the change must be communicated in writing to the Fund. Name changes must be submitted in writing to the Fund within 48 hours of the change.
- B. All major, foreseen changes to the budget must be communicated in writing to the Fund in a timely manner for the Fund's files.

V. Evaluation

- A. An evaluation report is due the Fund two (2) weeks after the end of the Fund's fiscal year or the end of the project, whichever is earlier, by the project director(s). The evaluation report should summarize all activities, outcomes and accomplishments, how the funds were used to achieve these, and key lessons learned. Should the project extend over multiple fiscal years, the project director(s) must submit a summary report each year.
- B. Failure to submit the evaluation report can lead to delays in subsequent processing of donations and disbursements. Until such time that the evaluation is received, the Fund reserves the right to refuse providing service to the sponsored project.

VI. Early Termination of the Fiscal Sponsorship

- A. Violation of the fiscal sponsorship policies as laid out in this document or agreement can lead to early termination of the fiscal sponsorship.
- B. Thirty (30) days prior to any permanent and final termination of services, the Fund will provide written notification to the project director(s). Within those thirty (30) days, the project director(s) can appeal to the Board of Directors through a written letter requesting resumption of services with clear explanation of the circumstances and why services should be resumed. The appeal should include a proposed timeline as to when and how issues/violations shall be resolved with the Fund. The Board of Directors will review and communicate the decision to the project director(s) within two (2) weeks of receiving the appeal.