



# The Institute for Advanced Career Development

## Application for Fellowship/Project Sponsorship

---

**Date of request:**

**Name of Project<sup>1</sup>:**

**Name of Principal Contact:**

**Telephone of Principal Contact:**

**Email (required):**

**Address:**

**Website (if available):**

**1. Are you applying as an individual (Fellow) or an organization?<sup>2</sup>**

- Fellow**
- Organization**

**2. If you are applying as an organization, what is the legal status of this project<sup>3</sup>?**

(Please Check one and provide date formed)

- |                          | Type                                                                         | Date formed |
|--------------------------|------------------------------------------------------------------------------|-------------|
| <input type="checkbox"/> | • Limited Liability Company                                                  |             |
| <input type="checkbox"/> | • Unincorporated association                                                 |             |
| <input type="checkbox"/> | • NC Nonprofit corporation                                                   |             |
| <input type="checkbox"/> | • North Carolina nonprofit corporation that has applied for 501(c)(3) status |             |
| <input type="checkbox"/> | • NC 501(c)(3) Corporation                                                   |             |
| <input type="checkbox"/> | • Governmental Agency                                                        |             |
| <input type="checkbox"/> | • A fiscally sponsored project of another 501(c)(3) organization             |             |
| <input type="checkbox"/> | • Other:                                                                     |             |

---

<sup>1</sup> A project is the organizational component funded for a permissible purpose. Projects can be suggested by Fellows (Individuals) or by organizations (often an entity formed for a service purpose). Projects have a discrete budget for which funds are being sought and their work is defined and managed by a project plan.

<sup>2</sup> Support from the IACD can vary depending on the needs of the individual or project. This helps us determine if there are potential special or complicating aspects to your application.

<sup>3</sup> The legal status of the project is useful to the IACD Board of Directors for our review. The status does not provide any specific benefit or advantage in this process.

# Application for Fiscal Sponsorship (Continued)

---

**3. Nonprofit purpose of the project (one sentence)<sup>4</sup>:**

**4. Anticipated Annual Budget<sup>5</sup> (Summarize here and provide full budget plans as attachment):**

\$

**5. Number on your Advisory Committee (minimum of three)<sup>6</sup>:**

**6. Do you anticipate having employees, volunteers, and/or independent contractors as part of the project for which you are making application to the IACD?**

	No	Yes	If yes, how many of each?	Are the personnel currently under your direction? <sup>7</sup>
Employees				
Volunteers				
Independent contractors				

**7. How will employees or contractors be paid?<sup>8</sup>**

**8. Do you anticipate that the project will include any of the following activities? If so, please describe each of the anticipated activities in the respective section(s):**

**Supporting or opposing any federal, state, or local legislation?**

No	Yes	If yes, please describe anticipated activities:

---

<sup>4</sup> The nonprofit purpose should be consistent with the objectives of the project, and should align with the permissible purposes of an IRS 501(c)(3) corporation whose mission is focused on education (for more info, see IRS Pub. 557).

<sup>5</sup> Summarize here and provide full budget plans as attachment. Your summary is important but not decisive. Your full budget will be used by the IACD Board in the acceptance process.

<sup>6</sup> If applying as an organization, you should have a separate advisory committee for addressing issues that come up while working with the IACD. The Advisory Committee may be the same as or different from your Board of Directors. If you do not have a Board of Directors, please indicate an advisory committee who will be willing to commit to their advisory role for the duration of your project's sponsorship with the IACD, if accepted.

<sup>7</sup> Personnel under your directions present an opportunity for the IACD to assist you with employee management. However, this is uncommon, and we would normally expect you to maintain your existing relationships.

<sup>8</sup> Payments are generally made to a project budget for distribution to employees or contractors. In some types of fiscal project sponsorship, payments can be made to personnel directly.

# Application for Fiscal Sponsorship (Continued)

---

**Supporting or opposing any initiative, bond, or other ballot measure to be voted on directly by the general public?**

**No Yes** If yes, please describe anticipated activities:

**Encouraging the public to support or oppose any such legislation?**

**No Yes** If yes, please describe anticipated activities:

**Conducting voter registration, get-out-the-vote, or other activities related to elections?**

**No Yes** If yes, please describe anticipated activities:

**Supporting or opposing, or favoring or disfavoring, any candidate for election to public office<sup>9</sup>?**

**No Yes** If yes, please describe anticipated activities:

**9. Has the project created or acquired any significant intellectual property to date, or do you anticipate having any (e.g., website, program materials, electronic media, publications, graphics, photos, artwork, member or donor lists)?<sup>10</sup>**

**No Yes** If yes, please describe:

---

<sup>9</sup> Note: Federal tax law prohibits the IACD and its sponsored projects from supporting or opposing any candidate for election to public office. Any project that anticipates conducting such activities is not eligible for fiscal sponsorship by Community Initiatives.

<sup>10</sup> In most cases, intellectual property remains an asset of the project and is returned to you at the conclusion of the sponsorship. The details are contained in the master agreement between the Principal, Fellow, or project manager and the IACD.

# Application for Fiscal Sponsorship (Continued)

**10. Do/would any of your anticipated project activities involve risk or require special insurance coverage?**

No Yes If yes, please describe:

**11. Have you contacted any funding agencies?**

No Yes

**12. If yes, have you secured any funding or pledges yet?**

No Yes If yes, please describe:

**13. Anticipated Source(s) of Revenue; please indicate status of funding (received, committed, applying, etc.):**

	<i>Amount</i>	<i>Funding Status</i>
<i>Foundation Grants: \$</i>		
<i>Government Grants: \$</i>		
<i>Donations: \$</i>		
<i>Events: \$</i>		
<i>Fee for Service: \$</i>		
<i>Other: \$</i>		

**14. Do you anticipate any funding restrictions<sup>11</sup> or limitations on use of the grants, funds, or pledges by the funding agencies or foundations?**

No Yes If yes, please explain.

**15. Are you currently using another fiscal sponsor?<sup>12</sup>**

No Yes If yes, please complete the following:

Fiscal Sponsor Name:

Name of contact:

Phone:

Email:

<sup>11</sup> Some agencies restrict the use of their funding in particular ways. For example, there may be limitations on administrative fees, or on types of research. The IACD is responsible for assuring compliance with these restrictions on the part of all the projects we sponsor.

<sup>12</sup> Switching from another sponsor is generally not a problem but may present both contractual and property issues for both the IACD and your project. The IACD needs proper disclosure if a project is transferring from another sponsoring entity.

## **Application for Fiscal Sponsorship (Continued)**

---

Please describe the attitude of the present sponsor toward the potential transfer of your project to another sponsor such as the IACD:

**16. Are you exploring other fiscal sponsors for this project?<sup>13</sup>**

**No Yes**

If yes,  
Who?

**17. How did you find us?**

**18. Project location/area of service by county (If not NC, please identify state):**

**19. Is the project a project seeking incubation?**

<b>If Yes,</b>	<b>Have you applied for 501(c) (3) status?</b>	<b>No Yes</b>
<b>Or,</b>	<b>Do you anticipate applying within the next five years?</b>	<b>No Yes Maybe</b>

**20. Is the project a collaborative effort?**

<b>If yes,</b>	<b>Is more than one foundation involved in launching this project?</b>	<b>No Yes</b>
<b>If yes,</b>	<b>Is this project the result of a single funder's initiative?<sup>14</sup></b>	<b>No Yes</b>

---

<sup>13</sup> Use of or application to other fiscal sponsors is not a problem. However, the IACD needs this information to be able to assist you within the timeframes set by your project. You should advise us of other negotiations so that we can be aware of your constraints and needs.

<sup>14</sup> The degree of commitment from more than a single funder can affect administrative complexity.

# Application for Fiscal Sponsorship (Continued)

---

## 21. Is the project a project of limited duration?

- |                               |                                                                                   |           |            |               |
|-------------------------------|-----------------------------------------------------------------------------------|-----------|------------|---------------|
| <b>If yes,</b>                | <b>Is this project a one-time special event?</b>                                  | <b>No</b> | <b>Yes</b> |               |
| <b>If more than one-time,</b> | <b>Do you anticipate this project being completed within the next two years?</b>  | <b>No</b> | <b>Yes</b> |               |
| <b>If long term,</b>          | <b>Do you anticipate this project being completed within the next five years?</b> | <b>No</b> | <b>Yes</b> | <b>Longer</b> |

Please prepare your application package in one group containing this application form and all required documentation. You may FAX, or scan and email to [info@theiacd.org](mailto:info@theiacd.org)

The application fee is \$200. and may be enclosed or delivered separately. If enclosed, please provide funds drawn on a corporate bank account or certified check.

If requesting a fee waiver<sup>15</sup>, please check here  and provide explanation as to the reasons for a fee waiver:

### APPLICATION CHECKLIST

Have you:

- Filled out all items on this questionnaire?
- Attached a description of your project indicating the following?
  - When it began
  - Its size, scope, and aspirations
  - Its nonprofit purpose
  - The number of participants
  - The target beneficiaries of your activity
- Attached an income-and-expense budget for this current year and past year, if available?
- Attached a list of your Advisory Committee (minimum of three) with their contact information and brief biographies?
- Attached a bio or resume for the project director?
- Please submit your application to [info@theiacd.org](mailto:info@theiacd.org)

---

<sup>15</sup> Fee waivers are granted when the project demonstrates proper reasons for waiver. This does not affect the decision process for your project.

# Application for Fiscal Sponsorship (Continued)

---

**Questions?**

If you have any questions, please contact the IACD at **919-349-6990** or by e-mail: **info@theiacd.org**

The IACD, Inc. is a North Carolina Nonprofit corporation, organized exclusively for educational purposes as defined in IRS Code § 501(c)(3) pertaining to exempt purposes<sup>16</sup>.

The purposes of any project sponsored by the IACD, Inc. must align with and adhere to these exempt purposes, and by your application, you are asserting that your project will perform accordingly.

Full Name of Applicant \_\_\_\_\_

Date Signed / Submitted \_\_\_\_\_

---

<sup>16</sup> *The exempt purposes set forth in section 501(c)(3) are charitable, religious, educational, scientific, literary, testing for public safety, fostering national or international amateur sports competition, and preventing cruelty to children or animals. The term charitable is used in its generally accepted legal sense and includes relief of the poor, the distressed, or the underprivileged; advancement of religion; advancement of education or science; erecting or maintaining public buildings, monuments, or works; lessening the burdens of government; lessening neighborhood tensions; eliminating prejudice and discrimination; defending human and civil rights secured by law; and combating community deterioration and juvenile delinquency.*