

## The Heinz Endowments Grant Application - Fiscal Sponsor

### About Fiscal Sponsors

**Please note: There is no auto-save in this application. Please be sure to save your work periodically.**

#### About Fiscal Sponsors

A fiscal sponsor is a public charity exempt under 501(c)(3) of the Internal Revenue Code that provides control and oversight over the activities of a non-exempt group or individual. These activities must further general charitable purposes as defined in section 501 (c)(3). Fiscal sponsors may receive grants for activities that further charitable purposes but will be carried out by organizations or individuals that are not themselves exempt public charities under section 501(c)(3).

**The Heinz Endowments expects that fiscal sponsors, at a minimum, are able to:**

1. Have ultimate discretion and control over the activities of the non-exempt recipient. The control must be real.
  2. Have the ability to require certain actions and accountings by the recipient and to redirect the funds if the recipient does not comply.
  3. Have the appropriate resources and expertise to oversee and control the activities of the recipient.
- Please contact your fiscal sponsor if you have questions on these points.

#### Fiscal Sponsor Questions

Is the organization acting as a fiscal sponsor familiar with the National Network of Fiscal Sponsors' (NNFS) guidelines for best practices?

*To review the NNFS Guidelines click the following link: [NNFS Guidelines](#)*

Yes I am familiar with NNFS Guidelines

How do you follow the NNFS Guidelines? (250 words)

How does your organization maintain internal control and compliance systems in order to comply with terms of grants and contracts, as well as laws, regulations, and accounting standards? (250 words)

Is there alignment between the mission of the project and the mission of your organization? (250 words)

Are the implications of the fiscal sponsorship arrangement fully understood by both parties, including legal relationships, liabilities, ownership of results, intellectual property, and tax filing responsibilities? (250 words)

Is there an existing written agreement between the project and your organization that documents the fiscal sponsorship?

*The Heinz Endowments requires that fiscal sponsors upload a copy of the agreement, signed and current dated by both parties. This will be required at the end of this application.*

## Fiscal Sponsor Organization

### Fiscal Sponsor Organization Information

Fiscal Sponsor Organization Name

Legal Name

*This is your legal name that the IRS has on file, populated by the Tax ID you provided at the beginning of this form.*

Also Known As

*Please add any abbreviations, nicknames or acronyms, separating them by commas.*

Mailing/Street Address

City          State          Zip Code  
                  PA

Organization Main Phone

*Please use the following format: (###) ###-####.*

Organization Main Fax

*Please use the following format: (###) ###-####.*

Organization Email Address

*e.g.. info@heinz.org (generic email address for the organization), if applicable*

Website

### Additional Organization Information

Organization Budget

*What was your organization's total annual budget in the last completed fiscal year?*

Number of Full Time Employees

Audit Completed Flag

Date Fiscal Year End

*Please provide the fiscal year end date of the most recent audit available.*

Mission **(250 words)**

*What is the mission of your organization?*

Major Successes **(500 words)**

*Please describe the history and major successes of your organization.*

*(These need not relate directly to the project or work proposed in this application.)*

Have you previously received funding from The Heinz Endowments?

Past Funding History (250 words)

If yes, briefly describe

### Contact Information

#### Head of Fiscal Sponsor Organization (e.g, CEO, President or Executive Director)

Prefix      First Name      Middle Name      Last Name      Suffix  
<None>

Title      Email

Office Phone      Extension  
Please use the following format: (###) ###-####.

Office Fax      Mobile Phone  
Please use the following format: (###) ###-####.      Please use the following format: (###) ###-####.

Mailing/Street Address

City      State      Zip  
PA

#### Contact at Fiscal Sponsor Organization

Prefix      First Name      Middle Name      Last Name      Suffix  
<None>

Title      E-mail

Office Phone

#### Primary contact for this grant request.

This is the person carrying out the activities. This person is not a part of the fiscal sponsor organization.

Prefix      First Name      Middle Name      Last Name      Suffix

&lt;None&gt;

Title      Email

Office Phone      Extension  
*Please use the following format: (###) ###-####.*Office Fax      Mobile Phone  
*Please use the following format: (###) ###-####.*      *Please use the following format: (###) ###-####.*

Mailing/Street Address

City      State      Zip Code  
PA

## Demographics

### Demographics Questions:

**For the past several years, The Heinz Endowments has promoted “Just Pittsburgh” as an aspirational vision of the region where everyone is treated with fairness, dignity and respect, and where everyone has an equitable opportunity to reach their fullest potential to thrive. We’ve used this vision as the foundation of our equity agenda to address historical structural barriers, disparities and racism that impact far too many.**

**While we maintain this commitment to the region, events of this year have magnified the need to deepen and prioritize our anti-racism and anti-discrimination efforts. We are addressing the root causes of racism, long-standing disparities, other biases and their many intersections. We will also increase targeted support to help develop policies and practices that counter systemic challenges.**

**We are still learning and trying to create change. We invite all of you to join us. Our approach for the Endowments is to collect and use data to expand our understanding of the needs of the communities and populations served, and how to target our resources to help us track progress, and to enable us to see how well we reflect our communities and populations.**

**As a starting point, we are soliciting your assistance in collecting demographic data on both your organization and the people and communities you serve. Please help us understand your grant proposal better by providing us with the following equity data about your organization, board, and grant activity management.**

**Answers are optional and self-reported to the best of your knowledge. Skipping a question is the same as declining to answer. If you are unsure or would like to provide additional clarifying details, a comments field is available for each section.**

### Head of the Organization/CEO/President/ED self-identifies as:

As an individual, how does the head of the organization self-identify?

**NOTE: please answer the following demographic questions related to the organization that will be carrying out this proposal (not the fiscal sponsorship organization):**

Race & Ethnicity (select one from list)

Gender Identity (select one from list)

**Primary Project Leader/Staff/Manager on this grant self-identifies as:**

As an individual, how does the primary project leader for this grant self-identify??

**NOTE:** please answer the following demographic questions related to the organization that will be carrying out this proposal (not the fiscal sponsorship organization):

Race & Ethnicity (select one from list)

Gender Identity (select one from list)

Comments or clarification on Head of Organization or Primary Project Leader (100 words)

**Demographics (cont)**

**Leadership Team profile:**

**NOTE:** please answer the following demographic questions related to the organization that will be carrying out this proposal (not the fiscal sponsorship organization):

Number of the organization's staff identified as leadership – such as director, senior, executive, or management:  
(please add a whole numeric value)

**Race & Ethnicity**

Of the number of leadership team members, what number self-identify as follows (please add a whole numeric value):.

Asian/Asian American	Black African American	Hispanic Latino/Latina	Native American American Indian	White Caucasian
Pacific Islander	African-descended	Latinx	Indigenous	European Unknown

Multi-Race or Multi-Ethnic  
2 or more races/ethnicities

**Sexual Orientation**

Of the number of leadership team members, what number self-identify as follows (please add a whole numeric value):

Gay, Lesbian	Heterosexual	
Bisexual	or Straight	Unknown

**Disability**

Of the number of leadership team members, what number self-identify as follows (please add a whole numeric value):

Person	Person	
With Disability	Without Disability	Unknown

**Gender Identity**

Of the number of leadership team members, what number self-identify as follows (please add a whole numeric value):

Male	Female	Non-Binary	Unknown
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Comments or clarification on Leadership Team Profile (100 words)

**Staff team working on this grant:?**

**NOTE:** please answer the following demographic questions related to the organization that will be carrying out this proposal (not the fiscal sponsorship organization):

Number of staff team members directly working on this grant:  
(please add a whole numeric value)

**Race & Ethnicity**

Of the number of staff team members directly working on this grant, what number self-identify as follows (please add a whole numeric value):

Asian/Asian	Black	Hispanic	Native American	White
American	African American	Latino/Latina	American Indian	Caucasian
Pacific Islander	African-descended	Latinx	Indigenous	European Unknown

Multi-Race or  
Multi-Ethnic  
2 or more races/ethnicities

**Sexual Orientation**

Of the number of staff team members directly working on this grant, what number self-identify as follows (please add a whole numeric value):

Gay, Lesbian	Heterosexual	
Bisexual	or Straight	Unknown

**Disability**

Of the number of staff team members directly working on this grant, what number self-identify as follows (please add a whole numeric value):

Person	Person	
With Disability	Without Disability	Unknown

**Gender Identity**

Of the number of staff team members directly working on this grant, what number self-identify as follows (please add a whole numeric value):

Male	Female	Non-Binary	Unknown
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Comments or clarification on Staff Team working on this Grant: (100 words)

**Demographics (cont 2)**

**Board of Directors President/Chair self-identifies as:**

As an individual, how does the board chair/president of the organization self-identify??

**NOTE:** please answer the following demographic questions related to the organization that will be carrying out this proposal (not the fiscal sponsorship organization):

Race & Ethnicity (select one from list)

Gender Identity (select one from list)

**Board of Directors members' profile:**

**NOTE:** please answer the following demographic questions related to the organization that will be carrying out this proposal (not the fiscal sponsorship organization):

Total number of board members/trustees:  
(please add a whole numeric value)

**Race & Ethnicity**

Of the number of board members, what number self-identify as follows (please add a whole numeric value):

Asian/Asian	Black	Hispanic	Native American	White
American	African American	Latino/Latina	American Indian	Caucasian

Pacific Islander      African-descended      Latinx      Indigenous      European      Unknown

Multi-Race or  
Multi-Ethnic  
2 or more races/ethnicities

### **Sexual Orientation**

Of the number of board members, what number self-identify as follows (please add a whole numeric value):

Gay, Lesbian      Heterosexual  
Bisexual      or Straight      Unknown

### **Disability**

Of the number of board members, what number self-identify as follows (please add a whole numeric value):

Person      Person  
With Disability      Without Disability      Unknown

### **Gender Identity**

Of the number of board members, what number self-identify as follows (please add a whole numeric value):

Male      Female      Non-Binary      Unknown

Comments or clarification on Board President or Board Members (100 words)

## **Proposal**

### **Request Information**

Statement of Purpose (this is a 255 characters field which is approximately 100 words)

*In one brief sentence, detail the purpose of the grant (one-sentence summary; this is a 255 character field)*

Proposal Narrative (500 words)

*Provide an overview of the proposed work for this grant, including a description of how it will address and advance equity and your plans for implementation. Provide details about where and when activities will take place including information regarding accessibility to individuals with disabilities.*

Facilities (500 words)

*Please describe the facilities, or space, in which this proposed work will take place.*

Is the organization accessible to persons with disabilities?

**Leadership Team (500 words)**

*Provide qualifications for the team leading the proposed work, including how the team is connected to the community/communities of focus and reflects the demographics of the population(s) served.*

Over what period of time will this funding be used?

Project Start Date      Project End Date

**Project Budget**

*What is the total cost of the project?*

**Request Amount**

*What amount of funding are you requesting from The Heinz Endowments?*

Please select the type of support you are seeking.

*You may select up to four types, indicating the percentage of support for each selection. All selections must add up to 100%.*

**Funding Partners (100 words)**

*Please list any other funding partners for the work to be supported through this request.*

**Staff**

*If applicable, indicate The Heinz Endowments' staff person this should be brought to the attention of.*

## Goals and Measures

### Goal Alignment & Past Performance

**Endowments' Strategic Area Goals and Strategies**

*Which of the Endowments' [Strategic Area Goals and Strategies](#) is related to this proposal? Please select from drop-down below.*

**Connection to The Heinz Endowments' Goal (250 words)**

*How does this proposal connect to the goal you selected above?*

**Past Performance (250 words)**

*If this request is for an existing or similar project/program, please provide highlights of past performance of the project/program.*

**How will the level and quality of stakeholder engagement be assessed? (250 words)**

## Goals and Measures

**Briefly describe up to four project/program goals. For each goal, please be specific about outcomes and how you will measure achievement for your desired outcomes using data-driven metrics. If applicable, please include at least one goal that addresses ways to maximize equitable opportunities and impacts. Three of the four Goals and Measures are required!**

Goal 1 (250 words)

***Example:** A goal for the early literacy program was to increase the number of children able to read at grade level when they entered third grade.*

Goal 1 Measure(s) of Success (250 words)

***Example:** A measure of success for the after-school program was the reduction in participants' school suspensions from 10 to 3.*

Goal 2 (250 words)

Goal 2 Measure(s) of Success (250 words)

Goal 3 (250 words)

Goal 3 Measure(s) of Success (250 words)

Goal 4 (250 words)

Goal 4 Measure(s) of Success (250 words)

## Proposal Attachments

To upload a document, click the "Browse" button, locate the document on your computer, click "Open," then click "Upload." (Total upload size for all attachments combined is 75MB)

## Project Budget

### Project Budget

*Please attach a complete project/program budget with income and expenses. Indicate expenses to be covered by this request.*

**Fiscal Sponsorship Agreement****Signed and Dated Fiscal Sponsor Agreement**

*Upload a copy of the agreement between the project owner and the fiscal sponsor. This must be signed by both parties and include a current date.*

**Board of Directors****Board of Directors**

*Most recent list of board of directors and officers.*

**Signed Patriot Act****Signed Patriot Act**

*Upload a current year, Patriot Act statement on your corporate letterhead, signed by the head of the organization.  
[Click here for an example..](#)*

**Most Recent Audit****Most Recent Audit**

*Your most recent audited financial statement*

**Additional Information / Attachments****1. Attachment**

*Any additional information/attachments.*

**2. Attachment**

*Any additional information/attachments.*

**3. Attachment**

*Any additional information/attachments.*