

## The Process of becoming a Project Partner with the Center for Transformative Action (from: <http://centerfortransformativeaction.org/process-of-becoming-a-project-partner.html>)

Thank you for your interest in the Center for Transformative Action's fiscal sponsorship. Please review the following steps carefully before applying.

### 1. Please study our FAQ page and the eligibility and assessment criteria.

Many of your questions can be answered in these pages:

<http://centerfortransformativeaction.org/faqs-about-fiscal-sponsorship.html>

<http://centerfortransformativeaction.org/project-partner-eligibility.html>

### 2. Make an initial inquiry.

If, after reviewing these materials, you wish to apply for fiscal sponsorship or have additional questions, please contact us at 607-255-5027. We can answer your questions and help you determine if your project is a fit for our organization. We ask that you do not submit an application without contacting us first.

### 3. Submit a draft application for fiscal sponsorship and schedule a meeting with us.

See our Application page for details. It is important that we schedule an onsite interview at our offices in Ithaca, NY before we forward your final proposal to our Board Program and Finance Committees. We can provide feedback that could improve the project's chances for approval and address any questions you may have. While some of this can be done by email and phone, we find that an in-person meeting helps you get a better understanding of our organization, its culture, and how it functions.

### 4. Meet with CTA staff in Ithaca, NY

During this meeting, we will provide suggestions for strengthening your Project Partner application, share our organization's purpose, values and philosophy, and explain how we deliver services to our fiscally sponsored projects. This is another opportunity to ask questions. We will also try to schedule a meeting for you with one or two of our local project leaders to hear their experience with CTA first-hand.

### 5. Submit a final application by the upcoming deadline.

Once your application is in its final form, our Program and Finance Committees will review it before it goes to the full Board of Directors for consideration. We mail the application to the Board for consideration two weeks before their meeting date. Please review our deadlines for application submission. The Program and Finance Committees may request additional information before your application goes to the full Board of Directors, which meets once a month. For this reason, it can take two months from when you submit your application for it to be considered by the full Board of Directors. (In rare cases, we can expedite a request by calling a special meeting of the Board.)

Deadlines for applications are accepted four times a year on these dates:

- For review beginning in October, please submit your final application by September 15
- For review beginning in February, please submit your application by January 15
- For review beginning in May, please submit your application by April 15
- For review beginning in August, please submit your application by June 15 (the Board of Directors does not meet in July)

### 6. Await approval from the CTA Board of Directors.

The Board will approve or decline your application or request additional information.

If your project is approved for fiscal sponsorship, we will notify you and send you a draft agreement to review

prior to your orientation.

If the Board requested more information on your project, your application will be reviewed again at its next meeting.

If your project is declined by the Board of Directors, we will make every effort to refer you elsewhere or suggest a next step.

7. Attend an orientation meeting at our offices in Ithaca, New York and sign the affiliation agreement. Once your project application is approved by the CTA Board of Directors, you will sign an affiliation agreement to begin operations under CTAs 501(c)3. This should occur within one year of acceptance. During the orientation, which takes about two hours, you will get detailed information about how we operate and how CTA and its projects assume joint accountability. Because of the importance of this initial training/signing/information session, an onsite visit is required. We encourage you to bring along members of your Advisory Board so that they gain a direct understanding of your project's relationship with CTA.