



## THE LEARNERS LAB FOUNDATION (TLLF) FISCAL SPONSORSHIP APPLICATION

**The Fiscal Sponsorship Application Cycle Is *Always* Open.**

**The Learners Lab Foundation (TLLF)** is a national, charitable incubator that operates a Technical Assistance Service Center (TASC), designs & manages a portfolio of workforce training initiatives as Charitable Programs (CP), serves as Fiscal Sponsor (FS) to new, young, and future 501c's, and recently established a multi-functional Executive Management Fellowship Academy. We are staffed by volunteers, interns, and an all-volunteer Advisory Committee that serves as our Governance Structure and Board.

The Mission of **The Learners Lab Foundation** serves to purposes,

- (1) to develop, acquire and provide access to free and discounted professional development resources, and
- (2) to help future tax exempt entities become established, & young tax exempts launch and mobilize their operations.

As a start-up of volunteers, so we know quite intimately the challenges and shortfalls that exist pursuing status as a tax exempt entity and then launching the endeavor thereafter, our own journey was far many too years in the making. Therefore, in addition our charitable and technical assistance work, **The Foundation** also serves as a fiscal sponsor for qualifying entities and program with or without their tax exempt status their 501(c)(3). *We are particularly focused on start-ups in the initial/early stages of their tax exempt status who are less than 2 years old.* If you're an idea on a piece of paper, that means you too!

### **Giving Voice to Young, Start-Up and New 501c's**

The Foundation will be conducting a Gap Analysis and Impact Research Study focusing on Fiscal Sponsorship Awardees. This multi-year study will be a series of anonymous surveys participants may contribute to at their discretion. Study will have a *continuance component* to it that allows participants to save and resume the entries over the life cycle of the study. As a start-up, young, or new tax exempt entity, we tend not to be recognized for our potential to bring new or untapped sources of revenue to the business community thru the markets we will serve, and we are consistently excluded from benefits, financial services, grant competitions, and discount programs, simply because we are young in our development, new to the table or just getting started. We want to study and document in real time the issues, benefits, and impact fiscal sponsorships have on fiscally sponsored entities. The results will be included in the Founders Dissertation or Presented for Peer Review if completed early. Its other goal is to benchmark what we need to deliver to Awardees to ensure you move forward in your maturation as a 501c and ours as a 501c & Sponsor. We want to assure we are always *on-point* as your Peer and Support Partner of Choice. Participation by our Awardees is not required.

Here's the thing...as a business demographic, we as young, new, future or start-up 501c's represent roughly 100,000 new business opportunities each year. The Learners Lab Foundation is part of that ignored and underserved market which was our motivation to serve as a Fiscal Sponsor. And because of that, we are uniquely positioned to help us become as self-sufficient as possible, and to be recognized for what we can and intend to contribute. Your participation in the survey will help give voice to that, but more importantly, your status as a Fiscal Sponsorship Awardee of The Learners Lab Foundation will more greatly facilitate our ability to serve you and all propel forward all of us as each other peer.

Thank You for Considering Us.

### **WHO WE SPONSOR AND HOW**

**PLEASE BE ADVISED: The Learners Lab Foundation DOES NOT award funding grants of any kind.** Instead **The Foundation** help to identify peer Foundations that make grants. You must register with our Technical Assistance Service Center for this support. Kindly refer to the [TASC Registration and Retainer Package \(Click to Download\)](#) and our interim website [www.TheLearnersLab.org](http://www.TheLearnersLab.org) for more information on how to become a TASC Client.

### **Entities with International Interest**

**Does The Learners Lab Foundation support US entities running programs internationally? YES,** but only if they are physically headquartered in the UNITED STATES and eligible for recognition by the IRS as a US tax exempt entity. We are not chartered to operate in international waters but many of our peer fiscal sponsors are. So we are happy to locate them for you, just ask!

For International entities seeking sponsorship support or to receive for assistance in identifying International Entity Sponsorships, please download our TASC-Intl Registration Form. It's available from [www.TheLearnersLab.org/docs/TASC-Intl-R&R.pdf](http://www.TheLearnersLab.org/docs/TASC-Intl-R&R.pdf) and [www.TheLearnersLab.org/docs/TASC-Intl-R&R.docx](http://www.TheLearnersLab.org/docs/TASC-Intl-R&R.docx) respectively.

**The Learners Lab Foundation** is building a network of partner and mentoring resources to help us help minimize as many hurdles as is possible. Our program efforts are customized to the specific needs of each entity applying for fiscal sponsorship. TLLF's Founder



brings more than 30 years' experience and expertise in tax exempt volunteerism, start-up operations, all in roles such as senior executive, tax exempt officer, and management consultant. So we know there's plenty of support we can deliver and/or facilitate.

**Because of the prevalence of fraud, Applicants will be thoroughly vetted before a fiscal sponsorship is awarded. (Initial) [ ] We have submitted 1 or more Charitable Registrations granting us permission to fundraise in our home State, plus each additional state where we intend to raise funds [ ]. If not, we do that too!**

#### FISCAL SPONSORSHIP PROGRAM & PROCESSES

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 United States Internal Revenue Service (IRS)). US Entities are defined as programs and organizations' "**headquartered**" within the United States, who can then be recognized as a US entity by the United States Internal Revenue Service (IRS). Please consult the IRS website at [www.irs.gov](http://www.irs.gov) for clarification on its definition of a US tax exempt entity.

#### Program Categories and Application Fees

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

- Category 1: Applicants Pursuing Tax Exempt Status But Not Ready to File, \$450
- Category 2: Applicants Ready to File for Tax Exempt Status But Requiring Additional Assistance, \$350
- Category 3: Applicants Needing Operational or Program Management assistance, filing status not a factor, \$300
- Category 4: Applicants (With or Without Tax Exempt Status) Wanting Only Grant/Donation Processing, \$250

The Learners Lab Foundation's Fiscal Sponsorship Program is unique unto itself. We do not fit everyone into a templated program. Instead, we use our application to help YOU determine what your Fiscal Sponsorship Program will entail. As such, our application is both comprehensive and lengthy. The purpose of such is to us obtain thorough knowledge about what your organization is/aspires to be, and what your needs are or will be in order to help YOU determine what your Fiscal Sponsorship Program needs to be in order for it to be successful for you.

#### Application Process

TLLF's Fiscal Sponsorship Program application process consists of three steps:

- (a) application submission,
- (b) review, follow-up with the applicant (and a formal interviews if required), & notification, and
- (c) awardee welcome & formal registration into the program, which includes dissemination of the program registration form.

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 directly, the technical assistance required.

#### Program Term Length, Renewal, Conclusion

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. So we established the Technical Assistance Service Center for continued support.

#### Program Scope of Operations

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** registration process includes payment of a flat, one-time fee of \$500, its \$250 for Grant Only Sponsorship. This fee does not cover all expenditures, but helps off-set legal, fiduciary and compliance costs. Should there be a balance, excess funds are put used to secure initial program specific launch resources such as a Grant Management Account with our Financial Institution which we are required by law to maintain, donation account & page setup with Donation Pay & iATS, our Donation Payment Processor, or the initial Program Management fee should a Financial or PM support be required.

#### 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](http://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 Foundation?**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 are fine at this stage, no details are needed. Give just enough information to indicate the need. If approved, you'll be able to elaborate on the **TLLF Fiscal Sponsorship Registration Form** which is how we will develop the particulars of your fiscal sponsorship program in terms of supports and 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 other "non-financial" assistance do you need from The Learners Lab Foundation?**
- 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:**
- Organizational Chart, Governance and Overall Business Unit Development [  ]
  - HR Department and Infrastructure Development [  ]
  - Finance Department and Infrastructure Development [  ]
  - Financial Management, Grant Administration and Project Accounting [  ]
  - Technology Department and Infrastructure Development [  ]
  - Programmatic Development, Professional Development Training Department/Program/Materials [  ]
  - Industry/Service Specific Policy Development [  ]
  - Other type of assistance not mentioned [  ]
  - Compliance, Business or Operational Analytics, Actuarial services. [  ]

If none of the above services are required, tell us what you need, and state if a mentor or special partnership 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?**

#### INTEREST

The Learners Lab Foundation is building a self-reliance infrastructure for our peer start-up, future and young tax exempts, and we've named it, **InfoXchange™ (InfoX™)**. In addition to being a centralized information resource and newswire service, **InfoXchange™** will do something no other communication medium is willing to do, introduce a new, young, future, or start-up 501c each month

The Start-Up Hub Zone is a dedicated feature **InfoXchange™**, The Foundation’s hallmark program support. **InfoXchange™** will provide unrestricted, cost friendly, direct access to all the resources or information about the resource that we need. For you, it’s also an opportunity to introduce your organization to the business & local community on a national level and to alert new visitors on how you are and how you have progressed over time by periodically updating your profile as you see fit.

**InfoXchange™** is a program benefit for and free to our Fiscal Sponsorship Awardees. While posting and subscriptions are open anyone one, profiles are reserved for new, future, start-up and young 501c’s as long as their tax exempt status is less than 5 years old.

We encourage you to visit the interim site at: [www.InfoXchnng.com](http://www.InfoXchnng.com) and take advantage of this Awardee perk to become visible in the market.

**GRANTS, DONATIONS, & FUNDRAISING**

Are there any current, future, or ongoing activities we should be aware of with regard to anticipated grants, monetary donations, or fundraising activities? IF so, please complete the chart below 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 Are These Funds Targeted For?	Source of Contribution Funds (Circle all that apply)	Date Due or Expected
\$ 0.00		<input type="checkbox"/> You <input type="checkbox"/> Someone Else <input type="checkbox"/> A Group or Organization (insert name):	
\$ 0.00		<input type="checkbox"/> You <input type="checkbox"/> Someone Else <input type="checkbox"/> A Group or Organization (insert name):	
\$ 0.00		<input type="checkbox"/> You <input type="checkbox"/> Someone Else <input type="checkbox"/> A Group or Organization (insert name):	
\$ 0.00		<input type="checkbox"/> You <input type="checkbox"/> Someone Else <input type="checkbox"/> A Group or Organization (insert name):	
\$ 0.00		<input type="checkbox"/> You <input type="checkbox"/> Someone Else <input type="checkbox"/> A Group or Organization (insert name):	
\$ 0.00		<input type="checkbox"/> You <input type="checkbox"/> Someone Else <input type="checkbox"/> A Group or Organization (insert name):	

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)

**COMING SOON**

The Learners Lab Foundation is working to include the following **Sub-Categories Services**. Check as many of the pending serves below as you think may be needed.

- |   |   |
|---|---|
| a. Application Hosting Services <input type="checkbox"/>  | e. New & Small Business Loans, Investment, or other Financial Services <input type="checkbox"/> |
| b. Credit Union Business Account <input type="checkbox"/> | f. OEM Software and Technology Products <input type="checkbox"/>                                |
| c. Domain Registration                                    | g. Office Space, Building Acquisition or other Real Estate Logistics <input type="checkbox"/>   |
| d. ISP and Web Hosting Services <input type="checkbox"/>  | h. Toll-Fee Phone and Fax Number Registration <input type="checkbox"/>                          |



#### FISCAL SPONSORSHIP APPLICATION FEE AND PAYMENT INFORMATION

TLLF accepts online payments thru PayPal, Cashier's Check and US Postal Service Money Orders. The application fees categories are as follows: *(Check only one)*

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

**Click here to pay to use our secure PayPal Account: [TLLF Fiscal Sponsorship Application Fee via PayPal](#)**

*Any transaction stopped due to insufficient funds will incur an additional \$50 finance fee which must be included at your time of payment. Thank you.*

#### APPLICATION SUBMISSION PROCESS

Applications are accepted electronically via email and in hard copy courtesy of the US Postal Service. **Please include a scanned or PDF copy of your "PayPal Payment Confirmation and Receipt" with your application fee as "Proof of Payment" if you use PayPal when you submit your Fiscal Sponsorship Application.** Applications submitted without the application fee or the PayPal confirmation/receipt will be considered incomplete and will not be processed until all is received.

##### For Applications submitted using email:

- a. PDF of scan and mail the completed Fiscal Sponsorship Application with your PayPal Confirmation to: [FSponsors@TheLearnersLab.org](mailto:FSponsors@TheLearnersLab.org), *Attn: Fiscal Sponsorship* in the subject line.

##### For Applications submitted as Hard Copy, and mail:

- a. By US Postal Service Priority or Express Mail with payment issued as Cashier's Check by a **US Banking Institution**.
- b. By US Postal Service Priority or Express Mail with US Postal Money Order *(only available from US Post Offices)*. We do not accept Money Grams and Western Union Instruments, thank you.
- c. By US Postal Service Priority or Express Mail **include PayPal Payment Confirmation** if paying online but mailing your application in.

##### For Cashier's Check or US Postal Service Money Order, make payable to:

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

*Attn: Fiscal Sponsorship Application for [Your Organization/Programs Name]*

**PLEASE SAVE & PRINTOUT APPLICATION**

**Then Initial, Sign & Date as indicated on the following Pages.**

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 TLLF 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 Foundation (TLLF) 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 TLLF 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 TLLF engages those interested in obtaining a fiscal sponsorship for their current or [future] tax exempt program or entity.

*TLLF's Advisory Council (TLLF/AC)* meets periodically, and commences new program participation on a cyclical basis as Awardees complete their program. TLLF **ALWAYS** reserves the right to modify or close an application cycle, and amend program criteria.

Application availability will be announced through print & web media, postings on the TLLF 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 (Print or Type)

\_\_\_\_\_  
Name of Your [Proposed] Organization or Program