



Trust for Conservation Innovation

Problem

Fiscal sponsorship lets projects share a common administrative and financial platform with a larger non-profit organization, thereby allowing projects to focus on their core missions. Fiscal sponsors provide legal and tax-exempt status for their projects and other “back-office” services like payroll and benefits, office space, fundraising, and training. While fiscal sponsors generally enable their non-profit projects to become more effective, several non-profit projects were interested in moving to a more streamlined and efficient fiscal sponsor. The primary goals for the new fiscal sponsor were to significantly improve grant tracking, financial services, and other support services at a reduced cost.

Solution

CEA evaluated several fiscal sponsors in the Bay Area region and designed the platform for a new fiscal sponsor: The Trust for Conservation Innovation (TCI). Specifically, CEA:

- Reviewed best practices in fiscal sponsorship.
- Analyzed the financial and legal requirements necessary to run a fiscal sponsor.
- Developed a mission, bylaws, internal policies and systems, and selection criteria.
- Guided the application process for establishing a new 501(c)(3).
- Helped recruit board members to guide the new organization.

Results

In 2002, CEA helped launch TCI as a new fiscal sponsor that could provide high-value, cost-effective services to its projects. In its first year of operation, TCI had four member projects that received superior services, while paying less in administrative fees than before. A report for the philanthropic and non-profit community on best practices for fiscal sponsorship was released and is available to the public.