Fiscal Sponsorship Annual Report

January 1, 20XX through December 31, 20XX

Thanks for filling out your fiscal sponsorship annual report. It's important that you answer all questions honestly and completely. This helps us provide the best possible service and to all of our fiscally sponsored members, and it also allows us to fulfil our own reporting requirements to the IRS and state agencies.

Need a reminder of the fund release requests you submitted? It's all in your fund history.

Project Impact
Select a form field to view associated instructions.

Narrative:
* Please describe the activities of your project in 20XX. Please share any relevant milestones, achievements, or challenges. 
  *The limit is 100 words.*

* Please describe the people that experienced your work. 
  *The limit is 100 words.*

* What are your plans for the project for 20XX? 
  *The limit is 100 words*

* Below is the project description our board of directors approved at the time your project applied. Has this changed significantly since you applied? 
  Yes or No.

* How many people paid to experience your work? 
  How many people paid an entrance fee to visit your project, participate in your programming, or otherwise experience your work?

* How many people experienced your work for free? 
  How many people attended your project, participated in your programming, or otherwise experienced your work and paid no admission fee?

Artists Served:
Estimate the total number of artists who had any involvement in your work.
Project Spending
For each of the below categories, please estimate the total amount you spent during the year. Where applicable, we've pre-populated data based on your fund release history. If you spent additional money from outside funds, make sure you adjust those numbers accordingly.

PLEASE ONLY ENTER NUMBERS

Payroll
Wages and salaries:
Money that you pay regular employees who will receive a W2 from your project

Payroll taxes:
The employer's share of payroll taxes like social security, medicare, etc. for W2 employees

Employee benefits:
Employee fringe benefits like health insurance or a retirement plan

Contractors
Contract labor: accounting:
Fees for accounting services by non-employees

Contract labor: artists:
Fees paid to artists who are not regular employees of your project

Contract labor: fundraising:
Fees paid to fundraisers (e.g., grant writers, etc.) who are not regular employees of your project

Contract labor: legal:
Fees paid to attorneys

Production and Presentation
Production and exhibition:
Expenses related to creating and/or producing presentations, exhibitions or publications, including supplies, materials, design, printing, other media distribution and other related expenses

Recording and broadcasting:
Recording or broadcasting productions or performances

Royalties/rights and reproductions:
Costs for obtaining the right to use others' intellectual property, including expenses for the rights and reproductions of printed materials, photographic materials, artistic works, broadcasts, webcasts, recordings, staging, choreography, etc.

Security:
Security for your venue or event, including technical systems, cameras, and contracts with security firms.

Marketing
Advertising and marketing:
Including ad placement fees, professional consulting services, printing, etc.

Public relations:
Professional consulting fees, public appearance fees, press placement fees, etc.

Occupancy/Overhead
Equipment rental:
Rental of office or other equipment such as computer hardware, copiers, etc.

Printing:
Printing materials, not including those used specifically for marketing (list those under Advertising and Marketing)

Repairs and maintenance:
Maintenance, repairs and general upkeep of facilities and equipment

Space rental:
Rent for an office, performance, exhibition, rehearsal, storage, or other space

Supplies – office and other:
Office and other supplies

Utilities:
Include telephone, internet access, gas, electric, heating, cooling, water, and sewer services

Professional Development
Professional development / course fees:
Registration fees, etc.

Dues and subscriptions
Membership dues, subscription fees (online, periodical, etc.)

Travel
Conferences/meeting/festival registrations:
Entrance fees for events attended by project personnel; also include expenses incurred for meetings or conferences you host

Lodging and meals:
Hotels and meals while on business travel

Transportation:
Airfare, train, parking, etc.

Website
Website development and maintenance:
Payments to web designers or developers to build or maintain your website
Website hosting:
Hosting charges for your website

Banking/Financial
Bank fees:
Fees charged by a bank, NOT INCLUDING interest or finance payments

Insurance:
Do not include health insurance or workers compensation paid on behalf of employees; those should be listed under Employee Benefits

Interest and finance charges:
Interest fees on credit cards, lines of credit, etc.

Other
Other:
Anything that doesn't fit into some other category

Explain other expenses:

**Expenses Breakdown**
Estimate the percentage of total project spending that fell into each category. **The total must equal 100%.**

Fundraising:
Roughly what percentage of your total expenses were for fundraising?

Management/general:
Roughly what percentage of your total expenses were for management and general overhead?

Programs:
Roughly what percentage of your total expenses went directly towards fulfilling the artistic/charitable purposes of your project?

**Spending on Artist Fees**
*Percent of spending on artists*
Roughly what percentage of your total expenses went directly towards paying artists?

**Project Revenue**
Again, we’ve pre-populated data based on your donation history. If you had additional money coming in from outside funds, make sure you adjust those numbers accordingly.

Admissions and ticket sales:
How much revenue did your project earn as a result of visitation? This refers specifically to museums, galleries, historical societies or any organization charging an entrance fee. How much revenue did your project earn as a result of all ticket sales for performances, presentations or special exhibitions, etc?

Tuition, workshop, and lecture fees:
How much revenue did your project earn from payments for multi-session classes or semester-long courses offered at your project? How much revenue did your project earn as a result of one-time events such as workshops, lectures, a lecture series, etc?

Special events:
How much revenue did your project earn from events held for any purpose other than fundraising?

Gallery/publication sales:
How much revenue did your project earn from the sale of items in your gallery and/or from the sale of self-produced publications?

Membership dues/fees:
How much revenue did your project earn from the collection of membership dues or fees? Include donations made in return for benefits such as free admission, discounts and invitations to special events.

Contracted services/performance fees:
How much revenue did your project earn from any services it performed under contract to another organization? Include any fees for service, commissions, transaction fees, administrative fees, box office fees, application or audition fees.

Advertising revenue:
How much revenue did your project earn from the sale of advertising space in publications or other advertising opportunities offered by your organization?

Individual contributions:
Include the gift portion of any donations from individuals.

Grants and corporate contributions:
Include any grants from government, foundation, or corporate sources.

Other revenue:
Any revenue that doesn't fall into the other categories.

Based on the revenues and expenses you have provided you are reporting a surplus or deficit of:

Work Samples & Documentation
Feel free to share links or upload files that demonstrate what you've accomplished during the year. Examples might include programs, press releases, audio or video recordings, etc.