

Donor Agreement

Prepared by: Gena Rotstein, MA, FEA
Karma & Cents Inc.
#109, 5760 – 9th St. SE
Calgary, AB T2H 1Z9

Prepared for: NAME OF FOUNDATION OR DONOR and NAME OF CHARITY (Recipient)

This agreement between the **NAME OF FOUNDATION/DONOR** and **NAME OF CHARITY (BN: REGISTERED CHARITYABLE NUMBER RR 0001)** ADDRESS made on **DATE** is a binding document for **NUMBER OF YEARS OF PROJECT/AGREEMENT** to be used towards the **TITLE OF PROJECT**. For details on this project please see attached funding proposal.

The total value of this donation is not to exceed \$XXX CDN. These funds are to be disbursed in three tranches according to the project schedule attached to this agreement. *Below are example statements to clarify what the disbursements are to be used for.*

- The first disbursement will be used to develop the program, hire relevant staff and pilot the concept
- The second and third tranches are to be used to scale the program. These funds are to be disbursed pending the review of the pilot and marketing strategy following Year 1.

NAME OF FOUNDATION/DONOR is entrusting the funds to NAME OF CHARITY to cover the costs of the program starting DATES – *I.E. February 2021 through November 2023.*

We require **three** project reports: *List out the expectations around when and how you will communicate with the donor. If this is being initiated by the donor they will stipulate when and how they want to be communicated with. In the sample below, this was negotiated and driven by the donor.*

- Upon completion of Milestone 1 as outlined in the proposal (November 2021)
- Mid-point of Milestone 2 to assess any changes or pivots to the program required (October 2022)
- End of project no later than February 1, 2024

In some cases there are external factors that need to be in place to trigger a disbursement. Below is a stipulation around a partnership agreement with another agency before funds could be released.

In order for the first tranche of funding to be released The Donor requests the following as part of the stipulations regarding this donation:

1. Copy of partnership agreements/MoU with the following organization(s):
 - Name of organization

The remaining funds will be disbursed according to **Schedule A** attached.

NAME OF DONOR requests that the project participants from both NAME OF CHARITY and the NAME OF PARTNER ORGANIZATION organizations actively participate in the DONOR/FOUNDATION'S events as they arise and provide thoughts and guidance around other funding opportunities in the areas of MANDATE OF THE FOUNDATION.

This agreement guarantees fulfillment of the items listed above between both the Donor and the Recipient.

Name & Signature of FOUNDATION Representative: _____

Date: _____

Name & Signature of CHARITY Representative: _____

Date: _____

Schedule A – SAMPLE Budget and Disbursements AS NEGOTIATED BETWEEN THE TWO PARTIES

Deliverable	Milestone 1	Milestone 2	Milestone 3	Total
Develop content, delivery methods, evaluation tools	\$ 60,000			\$ 60,000
Pilot Programming	\$ 30,000			\$ 30,000
Evaluate, revise content and delivery as necessary, apply research and create reporting to stakeholders, including Silver Gummy Foundation	\$ 10,000			\$ 10,000
Recruit, Promote, Location		\$ 39,000	\$ 39,000	\$ 78,000
Roll-Out Full Programming		\$ 52,000	\$ 52,000	\$ 104,000
Evaluation & Improvement		\$ 26,000	\$ 26,000	\$ 52,000
Report & Promote Impact with Stakeholders		\$ 13,000	\$ 13,000	\$ 26,000
TOTAL	\$ 100,000	\$ 130,000	\$ 130,000	\$ 360,000

Disbursement #1 – February 2021 - \$100,000

Disbursement #2 – Upon confirmation that recruiting will begin (approximately February 2022) - \$130,000

Disbursement #3 – Upon confirmation that recruiting will begin for the 3rd year (approximately February 2023)