

Partnership Agreement

The Calgary Foundation welcomes the opportunity to fund partnerships where not-for-profit organizations without charitable status (Intermediaries) help Registered Charities and other Qualified Donees fulfill their mission.

Please review this document and all relevant links before signing. This form must be completed and signed by both the Qualified Donee and the Intermediary. Please note that in the event of a successful grant application, the Qualified Donee must submit the final Evaluation Report for the completed project.

Project Information

Project Title: _____

Registered Charity or other Qualified Donee*

Organization Name: _____

Charitable Registration Number: _____

Address: _____

The project that is the subject of this agreement supports our organization's mandate/mission. (Please check box to confirm.)

Name of primary contact: _____ Email: _____

Title: _____ Phone: _____

Not-for-profit organization without charitable status Intermediary**

Intermediary: _____

Address: _____

Name of primary contact: _____ Email: _____

Title: _____ Phone: _____

Type of Partnership

Please select the option that best describes the nature of partnership by checking off a box below.

[Consultant or contractor \(See section 3.1.1\)](#)
 The Intermediary agrees to carry out specific activities on the charity's, or other qualified donee's, behalf.

[Joint Venture participant \(See section 3.1.2\)](#)
 The Intermediary will work with the charity or other qualified donee to carry out a charitable activity. They will pool resources to accomplish charitable goals under the terms of a joint venture agreement.

[Co-operative participant \(See section 3.1.3\)](#)
 The Intermediary will work side by side with the charity or other qualified donee to complete a charitable activity. Rather than pooling resources and sharing responsibility for the project as a whole, each organization instead takes on responsibility only for parts of the project.

Direction and Control of the Project

Please identify how the Registered Charity or other Qualified Donee will maintain direction and control of the project (See section 4.1), by checking the applicable box(es).

Create a written agreement, and implement its terms. [\(See section 4.2\)](#)

Communicate a clear, complete, and detailed description of the activity to the Intermediary. [\(See section 4.3\)](#)

Monitor and supervise the activity, including requiring regular reporting. [\(See section 4.4\)](#)

Provide clear, complete, and detailed instructions to the Intermediary on an ongoing basis. [\(See section 4.5\)](#)

Arrange for the Intermediary to keep the Charity's funds separate from its own or to keep separate books and records. [\(See section 4.7\)](#)

Make periodic transfers of resources, based on demonstrated performance. [\(See section 4.6\)](#)

Withdraw or withhold funds or other resources at the charity's discretion.

Other (Please describe): _____

Signatures of Authorized Representatives

"I hereby accept that I have read, understood and will comply with the agreement above":

Registered Charity or other Qualified Donee	
X _____ Senior staff person or Board Chair (name and title)	_____ Date
Not-for-profit (Intermediary)	
X _____ Senior staff person or Board Chair (name and title)	_____ Date

CRA Guidance References:

[*CRA List of charities and other qualified donees](#)

[**Using an Intermediary to Carry on a Charity's Activities in Canada CG-004 \(June 20, 2011, Revised Nov 27, 2020\)](#)

[Public Benefit Test CPS-024 \(March 10, 2006\)](#)