



390 Main Street, 2nd Floor
Penticton, BC V2A 5C3
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Phone/Fax: 250-493-9311
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Application for Agency Sponsorship

The Community Foundation of the South Okanagan (CFSO) provides grants directly to registered charities and qualified donees under the *Income Tax Act* (i.e., organizations in possession of a registered charitable number from the Canada Revenue Agency, including Municipalities). In exceptional cases, a grant may be made to an agency acting as a sponsor for an organization that is not registered but wishes to carry out a charitable activity.

These are the requirements for such an application to be considered by the CFSO:

1. The applicant (the "Agent") must have a direct affiliation (e.g., a shared charitable purpose, membership in an umbrella organization, etc.) with the sponsoring organization (the "Sponsor Agency").
2. The following "General Information Regarding the Sponsor Agency" and "Agreement" must be completed.
3. A letter from the Sponsor Agency signed by its authorized signatory must be submitted indicating:
 - the nature of the affiliation or relationship with the Agent undertaking the project;
 - the Sponsor Agency's organizational mandate;
 - the Sponsor Agency's willingness to undertake financial and legal responsibility for the project;
 - an expression of interest and shared commitment to the project and the achievement of its objectives.
4. The Sponsor Agency must attach:
 - its Board of Director's (or Municipal Councillors') names, addresses and telephone numbers

GENERAL INFORMATION REGARDING THE SPONSOR AGENCY

1. Name of Sponsor Agency _____
Contact Person _____
2. Address _____

City/Town _____ Province _____ Postal Code _____
3. Telephone # _____ Fax # _____
E-mail _____ Website _____
4. Registered Charity # _____ or, Registered Business # _____
5. Board of Directors' (or Municipal Councillors') names, addresses and telephone numbers (List Attached)



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AGREEMENT BETWEEN THE SPONSOR AGENCY AND THE APPLICANT/AGENT

This **AGREEMENT** is made effective this _____ day of _____, 20_____.

BETWEEN: _____ (the "Sponsor Agency")

AND: _____ (the "Agent")

WHEREAS:

- A. The Sponsor Agency wishes to carry out the project described in the attached application (the "Project");
- B. The Project is charitable or other activity qualified to receive charitably donated funds from a Community Foundation under the *Income Tax Act* (Canada);

THEREFORE THE QUALIFIED DONEE AND THE AGENT AGREE AS FOLLOWS:

- 1. The Agent will act as agent for the Sponsor Agency for the purpose of establishing, maintaining and completing the Project.
- 2. The Project will be completed on or before _____.
- 3. Subject to sufficient funding through grants to proceed with the project, the Sponsor Agency will provide the total sum of \$_____ to the Agent for the purpose of carrying out the Project. Such funds will be advanced to the Agent in installments at such intervals and in such amounts as the Sponsor Agency at its discretion deems necessary for the carrying out of the Project.
- 4. The Sponsor Agency may withhold funds or decline to advance further installments if the Agent fails to comply with any of the terms of this Agreement or if the Sponsor Agency is dissatisfied with the progress of the Project.
- 5. The Agent will keep the funds that it receives from the Sponsor Agency separate from the Agent's own assets and will use such funds solely for the Project.
- 6. The Agent will report regularly to the Sponsor Agency on the progress of the Project and will permit the Sponsor Agency to inspect the Project at such times as the Sponsor Agency deems appropriate.
- 7. The Agent will maintain complete records of the use of the funds it receives from the Sponsor Agency and will provide copies of such records to the Sponsor Agency.

AUTHORIZATION:

The "Sponsor Agency"

Per: _____
Authorized Signatory (Chair/President)

Per: _____
Authorized Signatory (Senior Staff)

Date: _____

The "Agent"

Per: _____
Authorized Signatory (Chair/President)

Per: _____
Authorized Signatory (Senior Staff)

Date: _____