

For samples/templates

Sample Host Agreement between a Giving Circle and Nonprofit or Community Foundation

Below you will find draft language and sample categories you may want to include in your host agreement. Before entering into any contract, it's always a good idea to obtain legal advice.

This Administration Agreement, effective on this ____ day of _____, is made by and between the _____(giving circle) and the _____ (host organization).

Term

Specify dates for this agreement to start and end, and process for renewal and early termination by either party

Assign Staff

Designate which professional staff person from the host organization will coordinate activities in this agreement.

Fiduciary/Financial

Specify which of these services will be carried out by the host and which by the giving circle, and lay out any necessary rules or conditions for each:

- 501c3 umbrella
- Deposit/post contributions
- Invest and manage endowed funds
- Manage cash accounts
- Calculate market value
- Audit and 990 preparation
- Pledge collections
- Fund reporting
- Special events payment tracking/reporting

Fund Administration and Support

Specify which of these services will be carried out by the host and which by the giving circle, and lay out any necessary rules or conditions for each:

- Database development and management
- Develop/update fund policies
- Develop/administer thank you letters
- Respond to phone and e-mail requests for information
- General correspondence
- Routine meeting attendance
- Photocopying, postage, supplies and printing
- Work space and storage space

Grant Administration

Specify which of these services will be carried out by the host and which by the giving circle, and lay out any necessary rules or conditions for each:

- Grantee communications
- Develop RFPs
- Grantee Q & A

Proposal processing
Check disbursements

Development and Donor Relations

Specify which of these services will be carried out by the host and which by the giving circle, and lay out any necessary rules or conditions for each:

Information and referrals
Donor education
Research/data collection
Prospect identification

Does the relationship preclude donor solicitation by the host organization for a specific period of time?

How will host contact new donors to the foundation who are part of the circle; options include:

Newsletter list
Reporting list
Annual report list
Invitation list for foundation events
Annual meeting with circle members to explain relationship with foundation

Marketing, Communications, Special Events

Specify which of these services will be carried out by the host and which by the giving circle, and lay out any necessary rules or conditions for each:

Inclusion of fund name in host marketing materials
Inclusion of host name in circle marketing materials
Initial media announcement of circle
Strategic consulting
Branding services
Content development for marketing (web page, ads, brochures, etc.)
Event support
Media relations support, press releases, media inquiries

Fees

Specify the fees to be paid by the giving circle for these services and when payments are due.

Signatures

Dates