



**Public Grantmaking, Community Foundation, Giving Circles, and United Ways
Membership Application**

Name of Organization (as it should appear in directory and Philanthropy WV records)

Primary Contact (voting member of record) Title

Address

City State ZIP(+4 code)

(_____) _____ (_____) _____
Phone Fax

Email Website

Please list other staff, trustees, or contacts who should receive regular mailings & electronic announcements from Philanthropy WV: (attach additional pages or separate list, if necessary)

Name Title Email

Name Title Email

Number of Paid Staff (if applicable): full-time: _____ part-time: _____

Market Value of Assets: \$ _____ for fiscal year ending: _____

Total grantmaking in last year: \$ _____ for fiscal year ending: _____

Grantmaking in WV in last year: \$ _____ for fiscal year ending: _____

Type of Grantmaker:

- Community Foundation
- Giving Circle or Donor Advised Fund
- United Way
- Government Agency
- Federated Fund
- Other (please specify below):
 - Bank Trust
 - Individual Philanthropist
 - _____

Funding Interests:

- Arts, Culture, Humanities
- Education
- Environment and Animals
- Health
- Human Services
- International/Foreign Affairs
- Public/Society Benefit
- Religion
- Science and Technology
- Other: _____

Year founded: _____

EIN: _____

Target Populations, if any:

- My organization files a 990
- My organization files a 990-PF
- N/A
- Operating Foundation
- Religious Organization
- Service Club
- Supporting Organization
- Other: _____

- Early Childhood
- Youth
- Families
- Women
- Elderly
- Minority: _____
- Other: _____

Target Geographic Region:

- _____

Does your organization also raise funds or seek grants? ___ Yes ___ No

If yes, please supply your last year's annual budget. Your organization's grant expenditures (grants, related program costs, administrative costs for administering grants) must represent at least 30% or more of your annual budget, ensuring that you are primarily a grantmaking institution.

Are your organization's grant distributions primarily made on a discretionary basis to multiple recipients that are not subsidiary or related to the grantmaker?

___ Discretionary ___ Directed ___ Combination

Is there anything else you would like to tell us about your grantmaking institution? _____

In addition to the application, please attach the following applicable documents:

- Latest 990 or 990-PF
- IRS letter of determination
- Annual report and/ or list of grant recipients and amounts during past fiscal year
- Grant guidelines (if any) and Grant application form (if any)
- Budget

Applications are considered for approval by the executive committee or board of directors on a regular basis throughout the year.

Contact Consent

I understand that by providing the fax number(s) and email address(es) on behalf of _____, I am authorized to and hereby consent for this organization to receive faxes and/or email messages sent on behalf of Philanthropy West Virginia

Signature

Date

Legal Assurance

I affirm to the best of my knowledge that our organization is in compliance with applicable state and federal regulations. Our foundation/corporate giving program will comply to respect the non-solicitation policy and space of Philanthropy WV.

Authorized Signature

Date

Print Name

Title

DUES SCHEDULE:

Philanthropy West Virginia bases its dues on the average of the previous two year's grantmaking.

Total grantmaking in last year: \$ _____ for fiscal year ending: _____

Total grantmaking two years ago: \$ _____ for fiscal year ending: _____

Average grantmaking during previous two years \$ _____

| Average Grantmaking | Dues Level |
|---|-------------------|
| Public Grantmaking, Community Foundations, and United Ways (In-State) | |
| \$1 -- \$100,000 | \$350 |
| \$100,001 -- \$500,000 | \$650 |
| \$500,001 -- \$1,000,000 | \$950 |
| \$1,000,001 -- \$2,500,000 | \$1,300 |
| \$2,500,001+ | \$3,000 |
| Giving Circles, Donor Advised Funds, & Private Philanthropists | |
| <i>As groups or individuals interested in best philanthropic practices, connecting to other leaders, and enhancing your work in the area, you may join Philanthropy WV as a member at the low rate note to the right.</i> | \$250 |
| Government Agencies/Grantmakers | |
| | \$750 |
| Public Grantmaking & Community Foundations (Out of State) | |
| <i>Minimum dues, grantmaking less than \$500,000</i> | \$1,000 |
| \$500,001 -- \$750,000 | \$2,500 |
| \$750,001 -- \$1,250,000 | \$4,000 |
| \$1,250,001 -- \$5,000,000 | \$5,500 |
| \$5,000,001+ | \$7,500 |

** Membership allows for three primary contacts who will receive all communications and benefits, including member discounts for Philanthropy West Virginia programs.

Please mail completed application and payment to:

Philanthropy West Virginia
P.O. Box 1584
Morgantown, WV 26505
T: 304-517-1450
www.PhilanthropyWV.org



Membership Criteria

Philanthropy West Virginia members must have grantmaking as their primary focus of activity. Such grantmaking activity must be regular, systematic, accessible to the public, and open to a reasonable range of nonprofit organizations.

The following are eligible for membership in Philanthropy WV:

- Independent Foundations
- Community Foundations
- Corporate Foundations/Giving Programs
- Family Foundations
- Donor Advised Funds
- Federated Funds
- Government Agencies
- United Ways
- Organized Giving Circle
- Associate Member:
 - Law Firm
 - Bank Trust Department/Wealth Management Division
 - CPA/Accounting Firm
 - Bank
 - Grantmaker Service Provider

Other organizations with the primary purpose of grantmaking, which meet the following criteria, may be eligible:

1. The organization has a verifiable giving program in West Virginia.
2. The grantmaking program is a significant part of the organization's activities. As a guideline, grants awarded should make up at least 30% of the organization's total annual expenditures. (For corporate giving programs, the term "organization" refers to the corporate giving unit, not the entire corporation.)
3. The organization accepts applications, within its funding priorities, from the general public and does not restrict its giving solely to subsidiary chapters, member organizations or affiliates, or a single institution. The organization carries out a broad mission of philanthropy with greater than 50% of the organization's grant allocations awarded to *unrelated* organizations or greater than 50% to programs that support the greater nonprofit community.
4. The organization has awarded grants for a minimum of one year immediately prior to submitting an application for membership. (If less than one year, the organization may be granted an associate membership.)
5. The organization's primary purpose for joining Philanthropy West Virginia is a desire to improve its grantmaking program.

In order for grantmakers to gain the most value from participation in Philanthropy WV, it is essential that Philanthropy WV members relate to their colleagues with both openness and confidentiality as they gather for Philanthropy WV programs, like those related to the discussion of issues impacting their work, professional development sessions, and networking. Members should not use Philanthropy WV as a means to advance organizational fundraising or related business concerns, and Philanthropy WV staff will not advocate with members for fundraising purposes, other than those directly related to Philanthropy WV.