

Private, Family, Community, and Operating Memberships

Applicants for membership are asked to include the following as part of the application process:

- Completed application form
- Current IRS determination letter
- Most recent IRS Form 990 or 990-PF, including all schedules
- A current listing of board members and staff

If your foundation has not yet filed a 990 or 990 PF, but has begun making grants, a statement detailing grant activity will suffice.

The private, community, and operating membership dues are based on a three-year average of annual qualifying distributions. Payment Scale is outlined in the chart to the right.

*Community Foundations may choose whether or not to include “pass through” funds when calculating the three-year average of a community foundation’s disbursements. “Pass through” funds are defined as funds which reside with the foundation for less than one year and are not feed or are not reflected in the fair market value of the community foundation’s assets at year end.

Range of Average Annual Qualifying Distributions	2024 Annual Dues
\$ 0 to \$ 100,000	\$ 495
\$ 100,001 to \$ 250,000	\$ 545
\$ 250,001 to \$ 500,000	\$ 675
\$ 500,001 to \$ 750,000	\$ 1,265
\$ 750,001 to \$ 1 million	\$ 1,395
\$ 1 million to \$ 2 million	\$ 1,875
\$ 2 million to \$ 3 million	\$ 2,535
\$ 3 million to \$ 5 million	\$ 2,785
\$ 5 million to \$7.5 million	\$ 3,850
\$ 7.5 million to \$10 million	\$ 4,695
\$ 10 million to \$15 million	\$ 5,500
\$ 15 million to \$20 million	\$ 6,050
\$ 20 million to \$30 million	\$ 6,600
\$ 30 million to \$50 million	\$ 7,260
\$ 50 million to \$75 million	\$ 8,250
\$ 75 million and above	\$ 9,075

Corporate Memberships

Corporate foundations, corporate giving programs, and financial professionals serving as trustees and advisors of charitable trusts and foundations are eligible for corporate membership in Philanthropy Southwest. Eligibility requires a minimum of \$25,000 in annual giving distributed within the Southwestern United States (Arkansas, Arizona, Colorado, Nevada, New Mexico, Oklahoma, and Texas).

Applicants for corporate membership are asked to include the following as part of the application process:

- Application form or a description of your grantmaking
- A list of grantees
- Current IRS determination letter (if applicable)
- Most recent IRS Form 990 or 990 PF including all schedules (if applicable)
- Current list of board members (if applicable)

Member dues are determined by the organization’s number of employees who office in the Philanthropy Southwest region and are outlined in the chart to the right.

Number of Regional Employees:	2024 Annual Dues
3,500 +	\$7,500
500 – 3,500	\$5,000
100 – 499	\$2,500
1 – 99	\$1,500

Returning Application for Membership

Please return all completed application forms and supporting documents to Amanda Esaena, Director of Member Engagement, at amanda@philanthropysouthwest.org or mail to--

Philanthropy Southwest
3000 Pegasus Park Drive
Suite 706
Dallas, Texas 75247

All applications are reviewed by the Membership Committee and approved by the Board of Directors.

For questions about membership, the application process, or dues structure, please call the Philanthropy Southwest office at 214-740-1787

Information

Organization Name: _____
 Address: _____
 City, State, Zip Code: _____
 Website address: _____ Employer ID Number (EIN): _____ -- _____
 Year Established: _____ Year IRS Classification Received: _____
 Contact Person: _____ Phone Number _____ Ext: _____
 Title: _____ Email: _____

Membership in Philanthropy Southwest was referred by:

Name: _____ Organization: _____
 Phone number: _____ E-mail (if available): _____

Foundation Type & Assets

Type of foundation/organization (please check all that apply):

Private Corporate Community Operating* Other

* Is operating foundation/organization primarily funded by its own endowment? Yes No

* Does the foundation/organization engage in fundraising for its own benefit? Yes No

Source(s) of the organization's funds: _____

Is there an external asset manager? No Yes, contact information: _____

Assets as of last fiscal year:

Fiscal Year Ending	Assets (\$)	Grants (\$)
_____	_____	_____

For Private, Family, Community, and Operating Foundations: Dues are determined by AVERAGING either your **disbursements** for charitable purposes (IRS 990PF, Part I, Line 26d) or **program services expenses** of your foundation (IRS 990, Part IX, Line 25B), over the past three fiscal years. Based on your foundation's annual tax return, please provide the following information for the most recent three years.

Year 1:	Year 2:	Year 3:	3 Year Average
\$ _____	+ \$ _____	+ \$ _____	= _____
Disbursements or Program Service Expenses			(Total of 3 years divided by 3)

For Corporate Foundations and Giving Programs: Dues are determined by number of staff in the southwest region. Please list the number of employees working in our 7-state region: _____

Upon membership approval, Philanthropy Southwest will invoice the organization for dues payment.

Program Activity

Program Focus: _____
 Principal activities: _____

Does the foundation provide, participate in, or fund any of the following? (Check all that apply)

Capital Grants Collaborative Funds Endowment Funds Operational Support
 Research Scholarships Seed Money Other: _____

What is the timeframe of the organizations grantmaking process? (Check all that apply)

Annual Bi-Annual By- Invite Only Letter of Inquiry/Interest
 On-Going On-line Grant Application Quarterly Other: _____

Funding Region & Categories

Please list state(s) in which the foundation/organization is giving:

Area(s) served: International National State Local, cities or counties: _____

Select grantmaking categories (Check all that apply)

- | | |
|--|--|
| <ul style="list-style-type: none"> <input type="checkbox"/> Aging <input type="checkbox"/> Animal Protection & Welfare <input type="checkbox"/> Arts / Culture / Humanities <input type="checkbox"/> Civil Rights / Social Action / Advocacy <input type="checkbox"/> Communications/ Media <input type="checkbox"/> Community Improvement / Capacity Building <input type="checkbox"/> Crime / Legal Related / Juvenile or Social Justice <input type="checkbox"/> Disaster Preparedness / Relief <input type="checkbox"/> Educational Institutions <input type="checkbox"/> Education <ul style="list-style-type: none"> <input type="radio"/> Early Childhood <input type="radio"/> Higher Education <input type="radio"/> Kinder – 12 <input type="radio"/> After School / Out-of-School Time <input type="radio"/> STEM <input type="checkbox"/> Employment / Workforce Development <input type="checkbox"/> Environmental Quality / Protection / Sustainability <input type="checkbox"/> Equity & Inclusion: Racial /Ethnic /Gender / LGBTQ <input type="checkbox"/> Faith-Based Ministries / Spiritual / Religion Related <input type="checkbox"/> Families & Children <input type="checkbox"/> Financial Literacy / Asset Building <input type="checkbox"/> Food / Agriculture / Nutrition <input type="checkbox"/> Health: Access & Care <input type="checkbox"/> Health: General & Rehabilitative <input type="checkbox"/> Health: Disease / Disorders / Medical Disciplines | <ul style="list-style-type: none"> <input type="checkbox"/> History / Archaeology <input type="checkbox"/> Housing / Homelessness <input type="checkbox"/> Human Services <ul style="list-style-type: none"> <input type="radio"/> Early Childhood <input type="radio"/> Youth <input type="radio"/> Adults <input type="radio"/> Elderly <input type="radio"/> Women & Girls <input type="checkbox"/> Immigration / Refugees <input type="checkbox"/> International/ Foreign Affairs <input type="checkbox"/> Libraries / Library Science <input type="checkbox"/> Medical Research <input type="checkbox"/> Mental Health / Crisis Intervention <input type="checkbox"/> Non-Profit Capacity-Building <input type="checkbox"/> Public Policy Research & Analysis <input type="checkbox"/> Public Safety / Violence Prevention <input type="checkbox"/> Recreation / Sports / Leisure / Athletics <input type="checkbox"/> Rural Development <input type="checkbox"/> Science & Technology <input type="checkbox"/> Social Science Research Institutes <input type="checkbox"/> Urban Planning / Development <input type="checkbox"/> Veterans <input type="checkbox"/> Women’s Issues <input type="checkbox"/> Youth Development <input type="checkbox"/> Other: _____ |
|--|--|

Documentation

Is there any pending or anticipated legal or regulatory action against the organization? No Yes

If yes, please describe on a separate sheet of paper.

Does the organization have a current IRS determination letter? No Yes, attached to application form

Does the organization have a recent 990 or 990-PF form? No Yes, attached to application form

Is there a list of the organization’s officers, trustees, and staff attached to the application? No Yes

Please include email addresses for all staff members.

I certify that the above-listed organization operates in compliance with all applicable local, state and federal laws and regulations. I agree that representatives of this organization will not use their Philanthropy Southwest membership as a vehicle for solicitation of other Philanthropy Southwest members.

Authorized Representative’s Name: _____

Title: _____

Date: _____