

2023 Philanthropy Southwest Membership Renewal Form

Private/Family/Operating/Community Membership Renewal

Foundation Name:

Date:

Philanthropy Southwest dues for your foundation 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.

\$ + \$ + \$ = Total/3 =

Year 1:

Year 2:

Year 3:

3-YEAR AVERAGE*

Disbursements or
Program Services
Expenses

Disbursements or
Program Services
Expenses

Disbursements or
Program Services
Expenses

(3-year total divided by 3)

After calculating your three-year average, determine your dues according to the following schedule:

Please check the correct dues category and, if you choose, grant information below.

Three-Year Average:

2023 Membership 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

2023 Annual Dues: \$

IMPORTANT: Please indicate amount you are designating toward each of the categories below:

DUES: or **GRANT:** + **GIFT:** = **TOTAL: \$**

DUES: *Membership fee based on the schedule above.*

GRANTS: *A grant in lieu of dues made in support of Philanthropy Southwest equal to, or in excess of, the membership dues amount. Members making such grants will be provided with a letter of acknowledgement.*

ADDITIONAL GIFT: *A contribution toward the support of Philanthropy Southwest in addition to membership dues.*

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 or are not reflected in the fair market value of the community foundation’s assets at year end.

**Please return completed form with check made to: Philanthropy Southwest,
3000 Pegasus Park Drive, Suite 706 Dallas, TX 75247**

2023 Philanthropy Southwest Membership Renewal Form

Corporate Membership Renewal

Organization Name:

Date:

Philanthropy Southwest dues for corporate foundations, corporate giving programs, and financial professionals serving as trustees and advisors of charitable trusts and foundations are determined by the organization's number of employees who office in the Philanthropy Southwest region. The Philanthropy Southwest region is defined by the following seven states: Arkansas, Arizona, Colorado, Nevada, New Mexico, Oklahoma and Texas.

The corporate dues structure is as follows:

<i>NUMBER OF REGIONAL EMPLOYEES:</i>	<i>2023 MEMBERSHIP LEVEL:</i>
<i>3,500 +</i>	<i>\$8,250</i>
<i>500 – 3,500</i>	<i>\$5,500</i>
<i>100 – 499</i>	<i>\$2,750</i>
<i>1 – 99</i>	<i>\$1,650</i>

DUES: + **GIFT:** = **TOTAL: \$**

DUES: *Membership fee based on the structure above.*

GIFT: *A contribution toward the support of Philanthropy Southwest in addition to membership dues.*



Connected, Impactful Philanthropy

Member Profile

Name of Person Completing this Form: _____

The information provided will solely be used by Philanthropy Southwest for program development and member networking purposes.

Does your 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 _____

Grantmaking Process (Check all that apply):

- Bi-annual
- By invitation only
- Letter of Inquiry/Interest
- On-going
- On-line grant application
- Quarterly
- Other _____

Asset Size/Asset Management:

- <\$1M
- \$1M-\$4.9M
- \$5M-\$9.9M
- \$10M-\$19.9M
- \$20M-\$49.9M
- \$50M-\$99.9M
- >\$100M

External Asset Manager: Yes No

Annual Giving:

- <\$99,000
- \$100,000-499,999
- \$500,000-999,999
- \$1M-4.9M
- \$5M-9.9M
- \$10M-19.9M
- \$20M>

Geographic Funding Region (Check all that apply):

- Arizona
- Arkansas
- Colorado
- Nevada
- New Mexico
- Oklahoma
- Texas
- International
- North America
- Canada
- United States
- Local (City or County Level)
- Other _____

Number of Full-time Paid Staff: _____

Number of Part-time Paid Staff: _____

Governance:

Number on the Board of Directors: _____

Family-governed foundation Yes No

Lifetime Directors Yes No

Meetings of the Board of Directors:

- Monthly
- Quarterly
- Bi-annually
- Yearly
- Other _____

Grant and Administrative Staff Expertise Related to Philanthropy (Check all that apply):

- Communications
- Financial
- Grantmaking/PRI
- Legal
- Legislative/government relations
- Technology
- Other

Grantmaking Categories (Check all that apply)

- | | |
|--|---|
| <input type="checkbox"/> Aging | <input type="checkbox"/> Youth |
| <input type="checkbox"/> Animal Protection and Welfare | <input type="checkbox"/> Adults |
| <input type="checkbox"/> Arts / Culture/Humanities | <input type="checkbox"/> Elderly |
| <input type="checkbox"/> Civil Rights / Social Action / Advocacy | <input type="checkbox"/> Women and Girls |
| <input type="checkbox"/> Communications / Media | <input type="checkbox"/> Immigration & Refugees |
| <input type="checkbox"/> Community Improvement / Capacity Building | <input type="checkbox"/> International / Foreign Affairs |
| <input type="checkbox"/> Crime / Legal Related | <input type="checkbox"/> Libraries / Library Science |
| <input type="checkbox"/> Disaster Preparedness / Relief | <input type="checkbox"/> Medical Research |
| <input type="checkbox"/> Disease/Disorders / Medical Disciplines | <input type="checkbox"/> Mental Health / Crisis Intervention |
| <input type="checkbox"/> Education/Educational Institutions | <input type="checkbox"/> Nonprofit Capacity-building |
| <input type="checkbox"/> Adult Education | <input type="checkbox"/> Public Policy Research & Analysis |
| <input type="checkbox"/> Early Childhood | <input type="checkbox"/> Public Safety / Violence Prevention |
| <input type="checkbox"/> Higher Education | <input type="checkbox"/> Racial / Ethnic / Gender / LGBTQ |
| <input type="checkbox"/> K – 12 | <input type="checkbox"/> Recreation / Sports / Leisure / |
| <input type="checkbox"/> Out-of-School/After School | <input type="checkbox"/> Athletics Religion Related / Spiritual |
| <input type="checkbox"/> STEM | <input type="checkbox"/> Development Rural |
| <input type="checkbox"/> Employment / Workforce Development | <input type="checkbox"/> Science & Technology |
| <input type="checkbox"/> Environmental Quality / Protection | <input type="checkbox"/> Social / Juvenile Justice |
| <input type="checkbox"/> Equity and Inclusion | <input type="checkbox"/> Social Science Research Institutes |
| <input type="checkbox"/> Faith-based Ministries/Spiritual Well-being | <input type="checkbox"/> Sustainability |
| <input type="checkbox"/> Families & Children | <input type="checkbox"/> Urban Planning / Development |
| <input type="checkbox"/> Financial Literacy / Asset Building | <input type="checkbox"/> Veterans |
| <input type="checkbox"/> Food / Agriculture / Nutrition | <input type="checkbox"/> Women’s Issues |
| <input type="checkbox"/> Health Access & Care | <input type="checkbox"/> Youth Development |
| <input type="checkbox"/> Health – General and Rehabilitative | |
| <input type="checkbox"/> History and Archaeology | |
| <input type="checkbox"/> HIV / AIDS | |
| <input type="checkbox"/> Housing & Homelessness | |
| <input type="checkbox"/> Human Services | |
| <input type="checkbox"/> Early Childhood | |