

2021 Membership Renewal Form

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***
(3-year total divided by 3)
 Disbursements or Program Services Expenses Disbursements or Program Services Expenses Disbursements or Program Services Expenses

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.

<u>Three-Year Average:</u>	<u>2021 Membership Dues:</u>	
Less than \$250,000	\$ 450.00	<input type="checkbox"/>
\$250,000 to \$499,999	\$ 600.00	<input type="checkbox"/>
\$500,000 to \$1 million	\$1,150.00	<input type="checkbox"/>
\$1 million to \$2 million	\$1,700.00	
\$2 million to \$4 million	\$2,300.00	
\$4 million to \$6 million	\$3,500.00	<input type="checkbox"/>
\$6 million to \$10 million	\$4,250.00	
\$10 million to \$20 million	\$5,000.00	<input type="checkbox"/>
\$20 million to \$50 million	\$6,000.00	
More than \$50 million	\$7,500.00	

2021 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, 1910 Pacific Avenue, Suite 13500, Dallas, TX 75201**



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)**

Aging

Animal Protection and Welfare

Arts / Culture/Humanities

Civil Rights / Social Action / Advocacy

Communications / Media

Community Improvement / Capacity Building

Crime / Legal Related

Disaster Preparedness / Relief

Disease/Disorders / Medical Disciplines

Education/Educational Institutions

Adult Education

Early Childhood

Higher Education

K – 12

Out-of-School/After School

STEM

Employment / Workforce Development

Environmental Quality / Protection

Equity and Inclusion

Faith-based Ministries/Spiritual Well-being

Families & Children

Financial Literacy / Asset Building

Food / Agriculture / Nutrition

Health Access & Care

Health – General and Rehabilitative

History and Archaeology

HIV / AIDS

Housing & Homelessness

Human Services

Early Childhood

Youth

Adults

Elderly

Women and Girls

Immigration & Refugees

International / Foreign Affairs

Libraries / Library Science

Medical Research

Mental Health / Crisis Intervention

Nonprofit Capacity-building

Public Policy Research & Analysis

Public Safety / Violence Prevention

Racial / Ethnic / Gender Diversity

Recreation / Sports / Leisure / Athletics

Religion Related / Spiritual Development

Rural

Science & Technology

Social / Juvenile Justice

Social Science Research Institutes

Sustainability

Urban Planning / Development

Veterans

Women's Issues

Youth Development