



**Information -**

Foundation Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip Code: \_\_\_\_\_

Website address: \_\_\_\_\_

Contacts: *(Please provide name, title, and email)*

Executive Leadership--

Billing / Administration --

Program Updates & PSW Event Notices --

**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)

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

**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)

After calculating your three-year average, determine your dues according to the chart.

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

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

Dues: \$ \_\_\_\_\_

or

Grant: \$ \_\_\_\_\_

Additional Gift: \$ \_\_\_\_\_

Total Amount to be Paid: \$ \_\_\_\_\_

**Dues:** Membership fee based on scale in chart

**Grant:** Given in lieu of dues made in support of Philanthropy Southwest, amount is equal to or in excess of the membership fee. Letter of acknowledgement will be provided.

**Additional Gift:** A contribution towards the support of Philanthropy South in addition to membership dues

NOTE: 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.

**For Corporate Foundations and Giving Programs:** Dues are determined by number of employees working in the southwest region. The region is defined as the following states: Arkansas, Arizona, Colorado, Nevada, New Mexico, Oklahoma, and Texas.

Number of Employees Working in Region: \_\_\_\_\_

Dues: \$ \_\_\_\_\_

Additional Gift: \$ \_\_\_\_\_

Total Amount to be Paid: \$ \_\_\_\_\_

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

**Dues:** Membership fee based on scale in chart

**Additional Gift:** A contribution towards the support of Philanthropy South in addition to membership dues