

Grantmaker Membership Application

STATEMENT OF GRANTMAKER MEMBERSHIP

Donors Forum is the premier resource for networking and education, information and knowledge, and leadership and advocacy on behalf of philanthropy and nonprofits in Illinois. As a membership association of grantmakers, nonprofits, and their advisors, Donors Forum serves its constituents by promoting an effective and informed philanthropic and nonprofit sector.

Donors Forum encourages philanthropy that is guided by the values of openness, accessibility, ethical conduct and sensitivity to the diverse population of the community.

ELIGIBILITY

Grantmaker Membership is open to organizations or individuals whose primary activity is making grants for charitable purposes. The following organizations or funds are eligible for Grantmaker Membership:

- Private foundations, including private operating foundations
- Community foundations
- Corporate foundations or companies with a sponsored contributions program
- Charitable trusts, divisions, or other organizations which (i) have as the primary charitable activity the making of grants for charitable, religious, educational, or scientific purposes; and (ii) devote at least 60% of their budget to grants programs (grants, related program costs, administrative costs administering grants)
- Donor-advised funds
- Government-funded grantmaking entities with multiple beneficiary organizations (as opposed to a single beneficiary)
- Religious grantmaking institutions
- Federated funds with a grantmaking program
- Supporting organizations which support one or more grantmaking organizations or that have a grantmaking program
- Any individual with multiple charitable beneficiary organizations

Please submit your application, attachments, and payment, to Donors Forum, 208 S. LaSalle St., Suite 1540, Chicago, Ill. 60604; or scan and email to join@donorsforum.org.

Questions? Email join@donorsforum.org.

CONDITIONS OF GRANTMAKER MEMBERSHIP

In being considered for a Grantmaker Membership in Donors Forum, an organization or individual must indicate a willingness to:

- Complete the attached application
- State a desire to enhance the organization's grantmaking activities
- Agree not to use Membership to solicit donations
- Adhere to Internal Revenue Service codes relating to foundations, individuals, and other grantmaking organizations that carry out charitable activities
- Commit to equal opportunity practices in hiring and grantmaking
- Pay annual dues
- Subscribe to Illinois Nonprofit Principles and Best Practices, included in this application

APPLICATION

Name of organization _____

PRIMARY CONTACT	TITLE	EMAIL	
ADDRESS	CITY	STATE	ZIP
PHONE	WEBSITE		

Grantmaking Activities

Type of grantmaker

- | | |
|---|--|
| <input type="checkbox"/> Charitable trust | <input type="checkbox"/> Private corporate foundation |
| <input type="checkbox"/> Community foundation | <input type="checkbox"/> Private family foundation |
| <input type="checkbox"/> Corporate giving program | <input type="checkbox"/> Private independent foundation |
| <input type="checkbox"/> Donor-advised fund | <input type="checkbox"/> Public foundation |
| <input type="checkbox"/> Federated fund | <input type="checkbox"/> Religious grantmaking institution |
| <input type="checkbox"/> Government-funded grantmaking entity | <input type="checkbox"/> Supporting organization |
| <input type="checkbox"/> Individual donor | |
| <input type="checkbox"/> Operating foundation | |

Other _____

Please check all of the following areas in which you fund:

- | | |
|---|--|
| <input type="checkbox"/> Arts, culture, humanities | <input type="checkbox"/> Recreation and sports |
| <input type="checkbox"/> Education | <input type="checkbox"/> Youth development |
| <input type="checkbox"/> Environment | <input type="checkbox"/> Human services |
| <input type="checkbox"/> Animal-related | <input type="checkbox"/> International, foreign affairs, security |
| <input type="checkbox"/> Health care | <input type="checkbox"/> Civil rights, social actions, advocacy |
| <input type="checkbox"/> Mental health and crisis intervention | <input type="checkbox"/> Community improvement and capacity building |
| <input type="checkbox"/> Diseases, disorders, and medical disciplines | <input type="checkbox"/> Philanthropy, voluntarism, and grantmaking |
| <input type="checkbox"/> Medical research | <input type="checkbox"/> Science and technology |
| <input type="checkbox"/> Crime and legal-related | <input type="checkbox"/> Social science |
| <input type="checkbox"/> Employment | <input type="checkbox"/> Public and societal benefit |
| <input type="checkbox"/> Food, agriculture, and nutrition | <input type="checkbox"/> Religion based |
| <input type="checkbox"/> Housing and shelter | <input type="checkbox"/> Mutual and membership benefit |
| <input type="checkbox"/> Public safety, disaster preparedness, and relief | <input type="checkbox"/> Unknown |

Do you accept unsolicited letters of interest/proposals?

- Yes No

Financial Data

Please provide the following data for the most recently completed fiscal year:

Fiscal year (M/D/Y - M/D/Y)

Total assets amount (990-PF – P II 16c; or 990 – section 1, line 20) \$ _____

Total grant amount (990-PF – line 25, column a; or 990 - P I, line 13 [grants and similar amounts paid] \$ _____

Geographical Data

Percent of grant dollars made in Chicago metro area

% _____

Percent of grant dollars made in Illinois

% _____

Percent of grant dollars made in the U.S. outside Illinois

% _____

Percent of grant dollars made outside the U.S.

% _____

Organization Data

Year Founded _____

Please check which resources your organization makes available to potential grantees

- | | |
|---|--------------------------------------|
| <input type="checkbox"/> Annual report | <input type="checkbox"/> Grants list |
| <input type="checkbox"/> Application form | <input type="checkbox"/> Guidelines |

If you represent a corporate foundation or giving program:

Does your organization have a matching gifts program?

- Yes No

Does your organization have a volunteer program?

- Yes No

If so, who is the contact person for the volunteer program?

Name _____

Email _____

Illinois Nonprofit Principles and Best Practices

We ask each Grantmaker Member organization to subscribe to the following principles and strive to adopt the relevant best practices.

PREAMBLE

Nonprofit organizations—including foundations—must strive for excellence in realizing their missions, managing resources effectively, and governing well. Our democracy's corporate and tax structure benefits nonprofits. In return, they serve the public by providing opportunities for assisting underserved or disadvantaged populations, volunteerism and civic engagement, and developing new approaches to solving problems.

Mission and Purpose

1. The organization has a clearly stated charitable or education mission, approved by the governing body, in pursuit of public good.

Governance

2. The role, responsibilities, selection, and tenure of the governing body are clearly stated in the organization's governing and policy documents and understood by the governing body members.
3. The governing body ensures that its members are competent and knowledgeable, and it seeks diverse points of view and experience as needed to provide credible and effective oversight of all aspects of the organization's work.
4. The governing body regularly assesses the organization's mission and the effectiveness of the organization and its leadership in achieving it.
5. The full membership of the governing body is responsible for the organization, and each member acts at all times in an ethical manner and in the best interest of the organization and the public.

Legal Compliance, Fiduciary Responsibility, and Responsible Stewardship

6. The governing body and staff know about and comply with all federal, state, and local laws, regulations, and fiduciary responsibilities.
7. The governing body exercises active oversight of the financial affairs of the organization and sets policies to ensure that the organization's resources are used appropriately in furtherance of the organization's mission.

Communication, Accessibility, and Disclosure

8. The organization makes information about its mission, program activities, and finances available to the public and communicates in a clear and timely manner with those who request information.
9. Organizations that raise funds from the public or from donor institutions maintain solicitation policies that reflect the organization's mission and use of solicited funds.
10. Grantmaking organizations establish, follow, and clearly communicate processes for receiving, reviewing, and acting on grant applications and for monitoring and evaluating grants made.

Please visit www.donorsforum.org to read the best practices for each principle.