

# Grantmaker Membership Application

## STATEMENT OF GRANTMAKER MEMBERSHIP

Founded in 1974, Forefront is the statewide membership association for nonprofits, philanthropy, public agencies, and their allies. We provide education, advocacy, thought-leadership, and project management to attract investment to the sector, develop top talent, improve systems and policies, and build the organizational capacity of our members. **Forefront builds a vibrant social impact sector for all the people of Illinois.**

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

## 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 Forefront, 208 S. LaSalle St., Suite 1540, Chicago, Ill. 60604; or scan and email to [join@myforefront.org](mailto:join@myforefront.org).**

**Questions? Email [join@myforefront.org](mailto:join@myforefront.org).**

## CONDITIONS OF GRANTMAKER MEMBERSHIP

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

- Complete the attached application
- 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 (ending M/D/Y): \_\_\_\_\_

Total assets amount (990-PF – P II 16c; or 990 – P I, 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 \_\_\_\_\_

## DUES

Grantmaker Membership dues are equivalent of 0.002548 of the average total grant dollars directly managed by the organization for the previous two completed fiscal years.

### Minimum

If total grant are \$350,000 or less, annual dues are \$850.

### Maximum

If total grants are \$9 million or more, annual dues are \$28,600.

If assets are \$1 billion or more, dues are \$30,250.

### Calculating dues based on the formula

If your dues are not the minimum or maximum, refer to the sidebar for instructions on calculating dues, based on this formula:

Total grants, year end 20\_\_\_\_ (fiscal year 1): \$ \_\_\_\_\_

Total grants, year-end 20\_\_\_\_ (fiscal year 2): \$ \_\_\_\_\_

Grand total: \$ \_\_\_\_\_

Average (divide by two): \$ \_\_\_\_\_

Dues based on formula (multiply by 0.002548): \$ \_\_\_\_\_

### Special dues categories

Community foundations located outside of the metro-Chicago area of Cook, DuPage, Kane, Lake, and Will counties: \$425

Donor-advised funds: \$275

Individual grantmakers: \$550

Introductory rate for newly established private foundations which have not yet awarded grants: \$650 per year for the first two years

## DUES PAYMENT

Our check in the amount of \$ \_\_\_\_\_, made payable to Forefront, is enclosed.

Please charge our credit card \$ \_\_\_\_\_

Visa       Discover Card       MasterCard       AmEx

CARD NUMBER \_\_\_\_\_

EXPIRATION DATE \_\_\_\_\_

PRINT NAME ON CARD \_\_\_\_\_

SIGNATURE \_\_\_\_\_

### Illinois Nonprofit Principles and Best Practices

Through this membership application, we agree to subscribe to the principles and strive to adopt the relevant best practices.

Print Name \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

### To compute dues using the formula

Add the total of grant dollars awarded in fiscal year 1 to the total grant dollars awarded in fiscal year 2. Divide this sum by 2 for an average. Multiply this average by 0.002548 to reach your final dues total.

### For example:

**Total grant dollars awarded for fiscal year 1:** \$1,000,000

**Total grant dollars awarded for fiscal year 2:** \$1,000,000

**Sum:** \$2,000,000

**Average:** \$1,000,000

**Multiply average by 0.002548**

**Dues total:** \$2,548

### Material to accompany this application

- Provide a brief statement about your organization's principal funding areas; i.e., arts, education, healthcare, etc.
- Provide a brief statement about program and geographic areas and types of support you do *not* fund.
- If you are a corporate giving program, include a list of contributions by amount and organization for the most recently completed fiscal year.
- Include a list of staff members who should receive regular communications from Forefront. Include name, title, program area, phone, and email.
- Include a list of your board or trustees, including mailing addresses. Indicate which trustees should receive regular communications from us (unless you notify us otherwise, board members/trustees will receive only invitations to programs designed specifically for them).

**Please mail this form with enclosures to Forefront, 208 S. LaSalle St., Suite 1540, Chicago, Ill. 60604.**

**Keep the Statement of Membership and Illinois Nonprofit Principles and Best Practices in your files.**

# Illinois Nonprofit Principles and Best Practices

We ask each Grantmaker and Operating Nonprofit Member organization to subscribe to these 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.myforefront.org](http://www.myforefront.org) to read the best practices for each principle.