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

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

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.

Questions? Email join@myforefront.org.
Name of organization ________________________________

<table>
<thead>
<tr>
<th>PRIMARY CONTACT</th>
<th>TITLE</th>
<th>EMAIL</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADDRESS</td>
<td>CITY</td>
<td>STATE</td>
</tr>
<tr>
<td>PHONE</td>
<td>WEBSITE</td>
<td></td>
</tr>
</tbody>
</table>

**Grantmaking Activities**

Type of grantmaker

- [ ] Charitable trust
- [ ] Community foundation
- [ ] Corporate giving program
- [ ] Donor-advised fund
- [ ] Federated fund
- [ ] Government-funded grantmaking entity
- [ ] Individual donor
- [ ] Operating foundation
- [ ] Private corporate foundation
- [ ] Private family foundation
- [ ] Private independent foundation
- [ ] Public foundation
- [ ] Religious grantmaking institution
- [ ] Supporting organization

Other ________________________________

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

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

- [ ] Annual report
- [ ] Grants list
- [ ] Application form
- [ ] 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

<table>
<thead>
<tr>
<th>CARD NUMBER</th>
<th>EXPIRATION DATE</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>PRINT NAME ON CARD</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>SIGNATURE</th>
</tr>
</thead>
</table>

**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.
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 to read the best practices for each principle.