



Grantmaking Foundation or Fund - Membership Application

Name of Organization (as it should appear in directory and Philanthropy WV records)

Primary Contact (voting member of record) Title

Mailing Address City State Zip

() Phone Fax () Website

Email Twitter handle and/or Facebook page

Please list other staff, trustees, or contacts who should receive regular mailings & electronic announcements from Philanthropy WV: (attach additional pages or separate list, if necessary)

Name Title Email

Name Title Email

Number of Paid Staff (if applicable): full-time: part-time:

Market Value of Assets: \$ for fiscal year ending:

Total grantmaking in last year: \$ for fiscal year ending:

Grantmaking in WV in last year: \$ for fiscal year ending:

Type of Grantmaker:

- Private/Independent Foundation
Family Foundation
Community Foundation
Federated Fund

Funding Interests:

- Human Services
International/Foreign Affairs
Public/Society Benefit
Religion
Science and Technology
Arts, Culture, Humanities
Education
Environment & Animals
Health
Other:

Year founded:

EIN:

- My organization files a 990
My organization files a 990-PF
N/A
Other:

Target Populations, if any:

- Early Childhood
Youth
Families
Women
Elderly
Minority:
Other:

Target Geographic Region:

- County:
Multi-County:
Statewide
Multi-State:

Does your organization also raise funds or seek grants? Yes No

If yes, please provide your last year's annual budget. Your organization's grant expenditures (grants, related program costs, administrative costs for administering grants) must represent at least 30% or more of your annual budget, ensuring that you are primarily a GRANTMAKING institution.

Are your organization's grant distributions primarily made on a discretionary basis to multiple recipients that are not subsidiary or related to the grantmaker?

Discretionary Directed Combination

Is there anything else you would like to tell us about your grantmaking institution? _____

In addition to the application, please attach the following applicable documents:

- Latest 990 or 990-PF (not required if you are a new funder and don't have one yet)
- IRS letter of determination
- Annual report and/ or list of grant recipients and amounts during past fiscal year
- Grant guidelines (if any) and Grant application form (if any)
- Budget

Contact Consent: I understand that by providing the email address(es), social media pages, etc. on behalf of _____, I am authorized to and hereby consent for this organization to receive communications sent on behalf of Philanthropy WV.

Signature

Date

Legal & Confidentiality Assurance:

I affirm to the best of my knowledge that our organization is in compliance with applicable state and federal regulations. Our foundation/ giving program promises to respect the non-solicitation policy and space of Philanthropy WV.

Authorized Signature

Date

Print Name

Title

Dues schedule: Philanthropy WV's dues are based on the average of the previous two year's grantmaking

- **Total grantmaking for most recent fiscal year** \$ _____ **for fiscal year ending** _____
- **Total grantmaking in previous year:** \$ _____ **for fiscal year ending:** _____
- **Total grantmaking two before:** \$ _____ **for fiscal year ending:** _____
- **Average grantmaking during previous three years** \$ _____

If a new foundation, please share what is your anticipated amount of 1st year of grantmaking based upon the formula of your asset value \$ _____ x 0.05 (5%) = \$ _____ (projected grantmaking).

Three-Year Average of Grantmaking	Dues Level
In-State: Private & Family Foundations	
\$1 -- \$100,000	\$400
\$100,001 -- \$500,000	\$750
\$500,001 -- \$1,000,000	\$1,100
\$1,000,001 -- \$2,500,000	\$1,500
\$2,500,001 -- \$5,000,000	\$3,000
\$5,000,000+	\$5,250
Individual Philanthropist or Donor Advised Fund	\$250

** Membership allows for two primary contacts who will receive all communications and benefits, including member discounts for Philanthropy WV programs.

- Please check if you wish to pay by credit card. A 2.9% payment processing fee will be applied to your invoice.

Please email or mail completed application and payment to: Philanthropy West Virginia
 P.O. Box 1584, Morgantown, WV 26505
 P: 304.517.1450
 E: info@philanthropywv.org



2023 In-State Membership Renewal Form

Membership Period: January - December, 2023
Payment Due February 28, 2023

To Submit Your Renewal: Send a copy of this form with your dues check and any supplemental materials to:
Philanthropy WV, PO Box 1584, Morgantown, WV 26505
 Checks should be made payable to: *Philanthropy West Virginia* (EIN # 55-0721553)

Please select one: I have included our payment or Send us an invoice to pay by check
 Send us an invoice to pay by credit card.
 A 2.9% payment processing fee will be applied to the invoice.

Member Organization: _____

Please complete the following information for your organization (please note any changes in address):

Contact Information:

Primary Contact Person: _____

Mailing Address: _____

Phone: _____ Email: _____

Secondary Contact Person: _____ *(please list others on back of form)*

Phone: _____ Email: _____

Organizational Twitter: _____ Facebook: _____

(You may list up to two additional contacts on the back of this form to include in Philanthropy WV communication, please include emails.)

Financial Information: If a Foundation, Total Assets \$ _____
 Last Two-Years Average of Grants/Giving \$ _____

Membership investments are based on your organization and 2-year average of your grantmaking in West Virginia in 2020 and 2019, as outlined below. Your investment contributes 18% to our annual budget. This supports Philanthropy WV's basic operations.

<u>Average 2019 & 2020 grantmaking range</u>	<u>Level</u>
<i>(In-State Private, Family & Community Foundations)</i>	
_____ \$1 - \$100,000	\$400
_____ \$100,001 - 500,000	\$750
_____ \$500,001 - \$1 million	\$1,100
_____ \$1,000,001—\$2,500,000	\$1,500
_____ \$2.5 Million - \$5 Million	\$3,450
_____ \$5 Million +	\$5,250
_____ <i>Government Agencies</i>	\$750
_____ <i>Donor advised funds/Giving Circles</i>	\$250
_____ <i>Individual Philanthropist</i>	\$250

Per the information provided below and the investment level chart to the left, your membership investment level is:

\$ _____

This is for a 12-month period of membership from January 1 to December 31, 2022.

Meet the Match: Philanthropic Partners

Philanthropic Partners Program provides general support of Philanthropy WV's mission. Dues cover 18% of our operation. Your support as a Philanthropic Partner for 2022 will deliver high quality programs, services, and staff support for all members.. This year your support helps us "Meet the Match" toward our goal of raising a total of \$50,000 with a \$25,000 challenge. Please join us in making a contribution at one of the following levels:

- _____ **Friend of Philanthropy** \$500 - \$1,499
- _____ **Team Sustainer** \$1,500 - \$3,999
- _____ **Thriving Partner** \$4,000 - \$7,499
- _____ **Change Maker** \$7,500 - \$14,999
- _____ **Almost Heaven Leader** \$15,000 +

Philanthropic Partner Level \$ _____

If you would like more details about becoming a Philanthropic Partner, contact CEO/President Paul Daugherty at 304.517.1450.

Thank you for renewing your Philanthropy WV membership!

Questions? Contact our office at 304-517-1450 or email chad at chad@philanthropywv.org

2023 Membership Investment Increases

STRENGTHENING OUR FUTURE!

The Issue

For nearly thirty years, Philanthropy WV has proudly served as the leading authority on philanthropy in the Mountain State. Today we partner with over eighty charitable organizations to advance local solutions and build thriving communities in West Virginia. To ensure our continued leadership in the field, we are focused on adaptive business modeling. This constitutes significant changes to how our organization can build sustainable income sources to support the needs of a growing and dynamic service organization. Currently, Philanthropy West Virginia lags far behind its peers (other philanthropy serving organizations, or PSOs) in terms of income generated by membership investments. Most organizations garner between 35 - 60% of their income through annual member investments; Philanthropy WV only generates 14% of its operating budget from such income. Over time, we must work to increase this percentage.

The Solution

As such, Philanthropy WV must take steps to bolster our income and adapt our business model. Increasing member investments is the first key step to this plan. We will begin with a 15% increase in 2023, followed by a regular 2 - 3% increase every other year (2025, 2027, 2029, etc.) to offset inflation and rising costs.

- Staff will retain the ability to work with any member who finds the increases cost-prohibitive for their organization, modifying the increase over time to retain their membership.
- Board feedback has identified two additional solutions to help mitigate the impact of the proposed increases, both immediately and in the mid-term.
 - First, we will increase the period of time used for calculating members' grant making average from two to three years.
 - Second, we will pause the regular 2- 3% increases for grant making institutions in the \$2.5 - \$5M tier for the first six years after the 2023 adjustment (until 2029), to account for their tier making a significant jump in dues.
- The proposed increase in membership investments would raise Philanthropy WV's income to account for 16% overall.

Why Now?

As we've all seen in the news - and felt in our wallets - inflation is currently at a forty-year high. Cost of living and our operating expenses are up. Additionally, Philanthropy West Virginia made a critical update to modernize its technological capabilities and is back to near full staff capacity for the first time in several years. Though these moves impact our budget, they were both necessary and overdue.

While Philanthropy West Virginia has held off any member investment increases for more than six years, now we too, must catch up. This proposed increase for member investments will raise our revenue on that line item 25% with full participation. As membership continues to grow, these new rates are also more in line with membership at our peer PSOs in similar markets across the country, bringing us up to speed and closer to on par in one fell swoop.

From a position of greater financial stability offered by this adjustment, Philanthropy West Virginia will be able to continue to grow and better serve our members as the leading voice and partner for giving in the Mountain State.