

# APPLICATION

## Northern California Grantmakers Membership Application

### About NCG

**Inspiration. Community. Leadership.** Northern California Grantmakers (NCG) enhances the effectiveness of philanthropy by supporting regional grantmakers' efforts to learn, promote the field, and connect to peers and resources. Started in 1965 and incorporated in 1981, NCG is an association of foundations, corporate contributions programs and other private and public grantmakers to exchange ideas, improve cooperation among foundations, and increase their knowledge of community problems. NCG has grown to support the activity of more than 160 grantmaking organizations and individuals, with combined grantmaking of more than \$3 billion annually.

Our community has adopted The Effectiveness and Accountability Principles to promote greater awareness and stimulate vibrant, healthy discourse among NCG members about good governance and practice. We ask all new members to review these tenets as part of the application process, as participation as a member of NCG demonstrates a shared commitment to these values.

In 2011, we proudly celebrated our 30th Anniversary as Northern California Grantmakers. For the last three decades we have served our members, and we look forward to supporting the collective involvement and participation that makes our community thrive for many more years to come.

Here are just a few ways that NCG will strengthen our members' practices this coming year:

- **REGIONALLY HOLDING OVER 30 PROGRAMS** providing a range of professional development and peer learning with nationally recognized curriculum and partnerships, including collaborations with the other California regional associations;
- **OUR RESOURCEFUL WEBSITE** will provide you with personal connections to fellow members around common interests; tailored access to a nationwide knowledgebase of resources from other grantmaker associations; access to recent reports, news, trends and major issues;

- **DEEPENING OUR CAPACITY IN PUBLIC POLICY**, both as a provider of policy-related grantmaker education and as an effective policy link and resource for the northern California grantmaker community;
- **PROVIDING A COLLECTIVE PROBLEM SOLVING SPACE** through collaborative funding programs and task forces where you can address complex problems too large for one funder to take on individually; and
- **TARGETED SUPPORT OF GRANTMAKERS** for their different priority issue areas, through tailored listserves, newsletters and communications.

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## Membership Benefits

Northern California Grantmakers is a place where grantmakers come to learn. NCG supports the professional growth of its members with programs and activities that strengthen skills, share timely information, and offer new ways to approach the craft of grantmaking.

- **Professional Development Programs** provide year-round opportunities for grantmakers to deepen their practice through Skills-Building workshops, Member-Initiated Briefings, Issue Area Briefings, Member Gatherings, and Public Policy education.
- **Information, News and Resources** are communicated to members through our quarterly e-newsletters, program announcement emails, NCG's Blog and Twitter feed. Our website provides additional access to useful information, including a searchable Knowledge Management System.
- **Networking and Leadership Development** opportunities are available for members through our Affinity Networking groups and by participating in our various Committees.
- **Collaborative Enterprises** provide a place for leveraged grantmaking, affinity, and increased learning and innovation. The Arts Loan Fund and Emergency Loan Fund bring together grantmakers to evaluate requests for short-term, low-interest loans for nonprofits in need, a critical resource in the current economic climate.
- **Services & Discounts** are provided to members including full posting access to NCG's Job Bank, detailed searches in the Member Directory, one-time use Member Mailing Lists, and downloadable access to COF's Annual Salary Survey. Many discounts are available for publications, web-conferencing services, and other online directories and resources.

## Membership Eligibility

**NCG membership is open to the following types of grantmakers:**

- Community Foundations
- Corporate Foundations & Corporate Giving Programs
- Family Foundations
- Focused Funds & Philanthropic Giving Circles
- Government Grantmaking Agencies
- Independent Foundations
- Individual Donors and Donor Advised Funds
- Operating Foundations (with a minimal grantmaking component)
- Philanthropic Management Entities
- Public Foundations

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## Membership Criteria

- The applicant's primary purpose for joining NCG is a desire to improve its grantmaking program.
- The applicant awards \$25,000 or more per year in grants to multiple, unrelated organizations, within its funding priorities, and does not restrict its giving to subsidiary chapters or to a single institution. "In-kind contributions/grants" (products and/or services) will be considered as all or part of the applicant's eligible grantmaking in qualifying for membership but will not be used as a basis on which to calculate dues.
- The applicant makes available to the public information about its granting program (e.g. through its web site, or the use of printed materials, and/or by its IRS form 990PF).

**Exception:** Individuals and donor advised funds do not need to meet this criterion. However, donor –advised funds must be managed at organizations which meet this criterion.

- For organizational members, the grantmaking program is the most significant part of the applicant's activities.

### **Clarifications**

- An *Operating Foundation* may count the fair market value of the "in-kind" grants made to the philanthropic programs (exempt activities) they operate as well as monies they grant to other entities. However, they must maintain an annual program of direct grants that constitutes at least 10% of their operating budget.
- For *Corporate Giving Programs* and *Government Grantmaking Agencies*, the term "applicant" refers to the corporate giving unit, rather than the entire organization.
- Applicant reviews NCG's Effectiveness and Accountability Principles.

### **Clarification**

- These principles were designed for institutional members. Consequently we don't require individual members to sign the pledge. But as members of NCG's membership, we do expect members to act in accordance with the highest ethical standards and our Effectiveness and Accountability Principles.

## Membership Dues

NCG membership dues are tiered based on the total amount of grantmaking a member makes per calendar year, and range in amount from \$500 to \$15,000 (see application for tier details). The value of in-kind contributions is deducted from this annual calculation. Foundations with headquarters located outside of the Northern California region base dues on annual grants awarded within Northern California only. First year dues for new members are prorated for organizations joining NCG after June in any year.

For purposes of completing form 990-PF all dues in excess of \$500 may be reported as a grant rather than as administrative expenses.

## For Additional Information and Assistance

Please contact NCG Member Services at (415) 777-4111 or visit [ncg.org/membership](http://ncg.org/membership).

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## Northern California Grantmakers Application for Membership

Thank you for your interest in joining NCG. Please complete all sections of the application for NCG membership, and submit it to NCG staff along with the requested attachments. Once the completed application is received, all NCG benefits will be extended on a provisional basis. Applications are reviewed by Member Services and decisions are rendered as quickly as possible. Please call staff with any questions. We look forward to welcoming you to NCG!

This application is also available online at [nccg.org/membership](http://nccg.org/membership)

Organization Name \_\_\_\_\_ Year Established \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_  
Phone ( ) - \_\_\_\_\_ Fax ( ) - \_\_\_\_\_ Web Site \_\_\_\_\_  
Primary Contact Name \_\_\_\_\_ Title \_\_\_\_\_  
Primary Contact Phone ( ) - \_\_\_\_\_ ext. \_\_\_\_\_ Email \_\_\_\_\_

## About Your Organization

Type of Grantmaker (please check all that apply)

- |  |  |
|--|--|
| <input type="checkbox"/> Community Foundation                        | <input type="checkbox"/> Governmental Grantmaking Agency |
| <input type="checkbox"/> Corporate Foundation                        | <input type="checkbox"/> Independent Foundation          |
| <input type="checkbox"/> Corporate Giving Program                    | <input type="checkbox"/> Individual                      |
| <input type="checkbox"/> Donor-Advised Fund                          | <input type="checkbox"/> Operating Foundation            |
| <input type="checkbox"/> Family Foundation                           | <input type="checkbox"/> Philanthropic Management Entity |
| <input type="checkbox"/> Focused Fund or Philanthropic Giving Circle | <input type="checkbox"/> Public Foundation               |
|  | <input type="checkbox"/> Other (please describe): _____  |

Financial Information for fiscal year \_\_\_\_\_

Total Assets \_\_\_\_\_  
(not applicable for individual donors) \$ \_\_\_\_\_  
Total Grants Awarded \_\_\_\_\_  
(grants out the door) \$ \_\_\_\_\_  
Total Annual Expenditures \_\_\_\_\_  
(not applicable for individual donors) \$ \_\_\_\_\_

Do you accept applications from the public?

Yes  No

Do you provide information to the public about your granting program? (please attach)

Yes  No

Does your organization have paid staff?

Yes  No

No. of Full Time Staff \_\_\_\_\_ No. of Part Time Staff \_\_\_\_\_

Are you a member of the Council on Foundations?

Yes  No

A member of other philanthropic associations?

Yes  No

If yes, please specify: \_\_\_\_\_

## About Your Grantmaking

Please indicate your primary granting interests (check as many as apply).

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> Arts & Culture                 | <input type="checkbox"/> Health                     | <input type="checkbox"/> Religion              |
| <input type="checkbox"/> Children/Youth                 | <input type="checkbox"/> Housing                    | <input type="checkbox"/> Seniors               |
| <input type="checkbox"/> Civic                          | <input type="checkbox"/> Humanities                 | <input type="checkbox"/> Social Services       |
| <input type="checkbox"/> Economic/Community Development | <input type="checkbox"/> Legal/Civic Rights         | <input type="checkbox"/> Women                 |
| <input type="checkbox"/> Education                      | <input type="checkbox"/> Minorities                 | <input type="checkbox"/> Other, please specify |
| <input type="checkbox"/> Environment                    | <input type="checkbox"/> Peace/International Issues |  |

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What geographic area(s) do you fund in (check as many as apply).

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> Bay Area          | <input type="checkbox"/> Silicon Valley      | <input type="checkbox"/> International         |
| <input type="checkbox"/> Sacramento Valley | <input type="checkbox"/> Northern California | <input type="checkbox"/> Other, please specify |
| <input type="checkbox"/> Napa Valley       | <input type="checkbox"/> Statewide           |  |
| <input type="checkbox"/> Central Valley    | <input type="checkbox"/> National            |  |

## Public and Community Foundations please complete this section:

What is your total fund raising goal for the current fiscal year?	\$
Support from foundations	\$
Support from corporations	\$
Gifts and bequests from individuals	\$
Special events	\$
Other	\$
Total Revenue	\$

Please attach similar figures for your last fiscal year if the above items are not clearly indicated in your financial statement.

Does your organization serve as a fiscal sponsor for specific projects?  Yes  No  
If yes, please provide the following information:

Amount of project specific contributions received last year \$ \_\_\_\_\_

Amount of project funds disbursed last year \$ \_\_\_\_\_

Is this amount included in the total support figure above?  Yes  No

## Corporate Grantmakers please complete this section:

Does your corporation make in-kind donations of your own products or services?  Yes  No

If yes, is this your major form of contribution?  Yes  No

Approximate value of donated items \$ \_\_\_\_\_

Is this amount included in the total support figure above?  Yes  No

Please note that in-kind donations are not used to calculate NCG membership dues.

## Governmental Grantmakers please complete this section:

Is your grantmaking program open and competitive?  Yes  No

Are your grants made primarily to external nonprofit organizations?  Yes  No

## Operating Foundations please complete this section:

Percentage of operating budget for grantmaking \_\_\_\_\_ %

## Philanthropy Management Entities please complete this section:

What is the total amount of annual grants from your cumulative client list? \$

## Individuals and Donor Advised Funds please complete this section:

If you have a donor advised fund, where is it held?

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## About Your Membership Interests

Why do you want to become a member of NCG? Which membership benefits are of greatest interest to you?

What NCG programs are you most interested in? (check as many as apply)

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> Arts Loan Fund                                | <input type="checkbox"/> Emergency Loan Fund          | <input type="checkbox"/> Philanthropic Collaboratives |
| <input type="checkbox"/> Corporate Contributions Roundtable            | <input type="checkbox"/> Family Philanthropy Exchange | <input type="checkbox"/> Professional Development     |
| <input type="checkbox"/> Disaster Preparedness and Response Initiative | <input type="checkbox"/> Organizational Effectiveness | <input type="checkbox"/> Public Policy                |

How did you learn about NCG?

## Calculating Membership Dues *Pro-rated for Mid-year*

Please select a category using the formulas below. An invoice will be sent upon application approval.

Governmental Grantmakers ~~\$1,500~~ **\$750**

All Other Grantmakers with annual (calendar year) grantmaking from

\$25,000 to \$279,999 ~~\$500~~ **\$250**

\$280,000 to \$9,999,999  $\$ \quad \times .0018 =$   $\$ \quad /2$    
[maximum \$10,000]

\$10,000,000 to \$50,000,000 ~~\$12,500~~ **\$6,250**

Greater than \$50,000,000 ~~\$15,000~~ **\$7,500**

## Application Attachments

Please include the following with your application as applicable:

- |  |   |
|--|---|
| <input type="checkbox"/> Statement of Purpose          | <input type="checkbox"/> Annual Report  |
| <input type="checkbox"/> Grant Guidelines              | <input type="checkbox"/> Staff and Board Rosters                                      |
| <input type="checkbox"/> List of recent grants awarded | <input type="checkbox"/> Financial Statement from most recently completed fiscal year |

All applicants please sign below

Signature

Date

Name and Title (Please type or print)

# APPLICATION

## *Inspiration Community Leadership*

**Northern California Grantmakers**

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[www.ncg.org](http://www.ncg.org)