Membership
For Funders, Grantmakers and Philanthropy Serving Organizations

Philanthropy Massachusetts promotes the practice and expansion of effective and responsible philanthropy to improve the health and vitality of its region.

MEMBER BENEFITS
Connect with 2000+ colleagues at hundreds of Foundations, Grantmaking and other Philanthropic organizations and hundreds of Nonprofit organizations in Massachusetts. Get FREE access to events and services!

Learning Opportunities: Philanthropy Massachusetts provides briefings throughout the year presented by thought-leaders and experts on issues important to you
- In-person and virtual presentations and discussions on issues in health, education, human services, environment, arts & culture, youth and families, and more
- Best practice sessions, professional development and trainings for staff and trustees
- Trends in philanthropy and the nonprofit sector

Networks: Philanthropy Massachusetts connects funders interested in meeting other colleagues on shared interests, to learn from each other, and develop partnerships and collaboration. We host meetings by Region, by Role at your organization, and/or with similar Types of organizations such as Family, Public, Corporate and Private Foundations. Networks include:
- Community Foundations Roundtable
- Family Foundation CEO Roundtable
- CFO & Finance Directors
- Program Staff Learning Network
- Regional networks: Western MA, Greater Lowell, MetroWest, Essex County, Cape Cod and more
Also connect to funder collaboratives and affinity groups in philanthropy, locally, regionally and nationally and tap into Philanthropy Massachusetts’ national network of thousands of funders throughout the U.S.

Resources and Research: Philanthropy Massachusetts extends your capacity by providing access to resources, research, news and information enabling you to be more effective and informed in your grantmaking.
- Giving Massachusetts 2020 report & Funder Behavior during Covid19
- Customized Research: Our staff will assist you on researching policies, giving, expenditures, compensation, etc.
- Community Foundations Services: a Legal Help Desk provides quick answers to legal questions related to the operation of a community foundation, and a New England Listserv connecting to a national listserv
- Online resources: Requests for Proposals database, Jobs database, Common Proposal and Common Report Forms
• Support in **Organizing and Hosting a Zoom Meeting** for you and Free use of our **Conference meeting space** (including the ability to add virtual attendees) for your Trustee meetings and more

• **Publicize your news**, updates, events and activities, and stay on top of trends, reports and news in philanthropy via [www.PhilanthropyMA.org](http://www.PhilanthropyMA.org) and our bi-weekly *Member InfoNet e-newsletter*

**Voice for the Sector:** Philanthropy Massachusetts serves as a strong voice and advocate with media and representatives at the local, city and state level. Your foundation may also be a member of national associations and affinity groups, but belonging to a regional association provides greater collaboration and strength in the philanthropic sector and our communities.

**Support for Nonprofit Organizations:** Over 450 organizations are enrolled in Philanthropy Massachusetts’ **Nonprofit Partners Program** and hundreds more take part in our Meet the Donors series, attend technical assistance and capacity building workshops, and get grants research through our **Foundation Center Directory Online** access and research assistance on fund development.

**MEMBER CATEGORIES and HOW TO JOIN**

Organizations with grant making as their primary focus of activity, which are accessible to the public and open to a reasonable range of nonprofits, are eligible for membership, including the following:

- Bank charitable trust departments
- Public and Community foundations
- Governmental funding agencies
- Philanthropic research centers
- Operating foundations
- Philanthropic advisory services
- Private, independent and family foundations
- Corporate foundations and giving programs
- Wealth Management companies
- Individual Donors and Donor Advised Funds

Annual membership support covers the calendar year, may be provided in the form of a grant, and is based on grants made annually in Massachusetts.

To discuss how Membership might best fit your grant making organization, please contact CEO Jeff Poulos at ipoulos@PhilanthropyMA.org or 617.426.2606 x113. [www.PhilanthropyMA.org](http://www.PhilanthropyMA.org)
MEMBERSHIP SUPPORT SCHEDULE 2021

**General Membership** support covers the calendar year and is based on your estimated annual giving in Massachusetts.

**Circle of Champions Members** provide additional support in recognition of the valuable work Philanthropy Massachusetts provides to the greater nonprofit and philanthropic community. Dues only cover 60% of our operating budget.

**Associate Membership** is available at $500 for grant-makers in the following categories:

- Emerging or new foundations in pre-grant making status
- Philanthropic advisory services and wealth managers
- Foundations with primary offices located in states outside Massachusetts that are members of the regional association in the state or region where they are based.
- Individual donors making at least $50,000 in charitable contributions annually

<table>
<thead>
<tr>
<th>Estimated Annual Giving in Massachusetts</th>
<th>Circle of Champions</th>
<th>General</th>
</tr>
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<tbody>
<tr>
<td>$15,000,000 - or more</td>
<td>$22,000</td>
<td>$15,000</td>
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<tr>
<td>$10,000,000 -</td>
<td>$14,999,999</td>
<td>$17,500</td>
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<td>$599,999</td>
<td>$6,500</td>
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<td>$300,000 -</td>
<td>$499,999</td>
<td>$5,350</td>
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<td>$100,000 -</td>
<td>$299,999</td>
<td>$3,250</td>
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<td>less than $100,000</td>
<td>$99,999</td>
<td>$1,700</td>
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<tr>
<td>Associate*</td>
<td>$500</td>
<td>$750</td>
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Philanthropy Massachusetts is a nonprofit 501(c)(3) and support may be provided in the form of a grant. Exclusions in calculating level of annual giving include: product donations, pass-through donations, fiscal sponsorships, employee support to federated fundraising campaigns, and grants to individuals. Public and community foundations can base support on discretionary grants only rather than total grants, and government agencies engaged in grant making can base support on annual administrative budget rather than total grants. New members are eligible to receive a 20% discount in the first year, provided total membership support is not less than $500.


updated December 2020
MEMBERSHIP FORM

Organization Name: ____________________________
Address: ______________________________________
Address line 2: __________________________________
City: __________________ State: __________ Zip: ______
Phone: __________________ Fax: ________________
Website: ______________________________________
Primary Contact Name: _________________________
Primary Contact Title: __________________________
Primary Contact Email: _________________________

CONTACTS

Billing Contact (if different from above)
Name: _______________________________________
Title: _______________________________________
Organization (if different)
Mailing Address: ________________________________
City: __________________ State/Zip: __________ Phone: ______
Email: _______________________________________

If you wish for additional staff and trustees to receive program invites, updates and the InfoNet e-newsletter, provide contact info below (or attach on separate sheet)*:

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Note: Staff____ Trustee____</th>
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*Note: Philanthropy Massachusetts does not sell or share contact information without prior permission.
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**Type of Organization:**
- [ ] Community Foundation
- [ ] Corporate Foundation
- [ ] Corporate Giving Program
- [ ] Family Foundation
- [ ] Government Agency
- [ ] Independent Foundation
- [ ] Operating Foundation
- [ ] Philanthropic Advisory Services
- [ ] Public Foundation
- [ ] Wealth Management Company
- [ ] Individual
- [ ] Other ______________________

**Geographic Funding or Service Area:**
- [ ] Local __________
- [ ] Statewide in Massachusetts
- [ ] Regional (multi-state)
- [ ] National
- [ ] International
- [ ] Other ______________________

**Program Areas**
- [ ] Arts & Culture
- [ ] Civil/Human Rights/Advocacy
- [ ] Community/Economic Development
- [ ] Education
- [ ] Environment
- [ ] Health
- [ ] Housing/Shelter
- [ ] Human/Social Services
- [ ] International
- [ ] Religion
- [ ] Youth Development
- [ ] Other ______________________

**ORGANIZATIONAL DETAILS**

Total estimated Giving in MA for previous year: $_______________

Staff Size: ___ FT ___ PT  
Assets: $_______________  Yr. Founded _____

**Membership Category (check one):**
- [ ] Circle of Champions (willing to lead as supporters of the philanthropic field and provide additional support for Philanthropy Massachusetts operations. Membership dues only cover 60% of our operating budget.)
- [ ] General
- [ ] Associate

Amount (Use Enclosed Support Schedule): $_______________

Payment is:  ___ enclosed  ___ please bill us.

_____________________________  __________
Signature  Date

Return this form to:
Jeff Poulos, Chief Executive Officer  jpoulos@PhilanthropyMA.org
Philanthropy Massachusetts, 133 Federal Street, Suite 802, Boston, MA 02110