

# 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 **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
- Behavioral Health Funders
- Grantmakers of Color
- MA Arts Funders Network
- The Summer Fund donor collaborative

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 [jpoulos@PhilanthropyMA.org](mailto:jpoulos@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

Estimated Annual Giving in Massachusetts		Circle of Champions	General
\$15,000,000 - or more		\$22,000	\$15,000
\$10,000,000 -	\$14,999,999	\$17,500	\$12,500
\$5,000,000 -	\$9,999,999	\$15,500	\$9,500
\$3,000,000 -	\$4,999,999	\$12,500	\$8,500
\$2,000,000 -	\$2,999,999	\$11,150	\$7,000
\$1,000,000 -	\$1,999,999	\$10,200	\$6,150
\$700,000 -	\$999,999	\$9,050	\$5,000
\$600,000 -	\$699,999	\$7,050	\$4,300
\$500,000 -	\$599,999	\$6,500	\$3,000
\$300,000 -	\$499,999	\$5,350	\$2,500
\$100,000 -	\$299,999	\$3,250	\$1,700
less than	\$99,999	\$1,200	\$750
Associate*			\$500

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.*

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

617.426.2606



## MEMBERSHIP FORM

Organization Name:		
Address:		
Address line 2:		
City:	State:	Zip:
Phone:	Fax:	
Website:		
Primary Contact Name:		
Primary Contact Title:		
Primary Contact Email:		

### CONTACTS

<b>Billing Contact (if different from above)</b>		
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)\*:**

Name	Title	
Email		Note: Staff ___ Trustee ___
Name	Title	
Email		Note: Staff ___ Trustee ___
Name	Title	
Email		Note: Staff ___ Trustee ___
Name	Title	
Email		Note: Staff ___ Trustee ___
Name	Title	
Email		Note: Staff ___ Trustee ___
Name	Title	
Email		Note: Staff ___ Trustee ___
Name	Title	
Email		Note: Staff ___ Trustee ___

**\*Note: Philanthropy Massachusetts does not sell or share contact information without prior permission.**

## Philanthropy Massachusetts Member Form page 2

### Type of Organization:

- |   |  |
|---|--|
| <input type="checkbox"/> Community Foundation     | <input type="checkbox"/> Operating Foundation            |
| <input type="checkbox"/> Corporate Foundation     | <input type="checkbox"/> Philanthropic Advisory Services |
| <input type="checkbox"/> Corporate Giving Program | <input type="checkbox"/> Public Foundation               |
| <input type="checkbox"/> Family Foundation        | <input type="checkbox"/> Wealth Management Company       |
| <input type="checkbox"/> Government Agency        | <input type="checkbox"/> Individual                      |
| <input type="checkbox"/> Independent Foundation   | <input type="checkbox"/> Other _____                     |

### Geographic Funding or Service Area:

- |   |  |
|---|--|
| <input type="checkbox"/> Local _____                | <input type="checkbox"/> National      |
| <input type="checkbox"/> Statewide in Massachusetts | <input type="checkbox"/> International |
| <input type="checkbox"/> Regional (multi-state)     | <input type="checkbox"/> Other _____   |

### Program Areas

- |   |  |
|---|--|
| <input type="checkbox"/> Arts & Culture                 | <input type="checkbox"/> Human/Social Services |
| <input type="checkbox"/> Civil/Human Rights/Advocacy    | <input type="checkbox"/> International         |
| <input type="checkbox"/> Community/Economic Development | <input type="checkbox"/> Religion              |
| <input type="checkbox"/> Education                      | <input type="checkbox"/> Youth Development     |
| <input type="checkbox"/> Environment                    | <input type="checkbox"/> Other _____           |
| <input type="checkbox"/> Health                         |  |
| <input type="checkbox"/> Housing/Shelter                |  |

### 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**