



RECEIVED JUN 22

Public Grantmaking, Community Foundation, Giving Circles, and United Ways
Membership Application

African American Philanthropy in Action (AAPA)
Name of Organization (as it should appear in directory and Philanthropy WV records)

Melvin Jones President

Primary Contact (voting member of record) Title

90 TBKVF- Po Box 3041

Address

Charleston

WV

25331

City

State

ZIP(+4 code)

(304) 346.3620

Phone

()

Fax

mjones55@wvstateu.edu

Email

Website

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)

Timothy Gibson

Name

Title

Timothy J. Gibson@ml.com

Email

Michelle Foster

Name

Title

mfoster@TBKVF.org

Email

Number of Paid Staff (if applicable):

full-time: 0

part-time: 0

Market Value of Assets: \$ _____

for fiscal year ending: _____

Total grantmaking in last year: \$ 7,000

for fiscal year ending: _____

Grantmaking in WV in last year: \$ 7000

for fiscal year ending: _____

Type of Grantmaker:

Funding Interests:

- ☐ Private/Independent Foundation
- ☐ Family Foundation
- ☒ Giving Circle
- ☐ Government Agency
- ☐ Other (please specify below):
 - ☐ Bank Trust
 - ☐ Donor Advised Funds
 - ☐ Federated Fund
 - ☐ Organized Giving Circle
 - ☐ United Way

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

Year founded: 2013

EIN: See TGIUVF

Target Populations, if any:

- ☐ My organization files a 990
- ☐ My organization files a 990-PF
- ☐ N/A
- ☐ Operating Foundation
- ☐ Religious Organization
- ☐ Service Club
- ☐ Supporting Organization
- ☐ Other: _____

- ☐ Early Childhood
- ☐ Youth
- ☐ Families
- ☐ Women
- ☐ Elderly
- ☒ Minority: _____
- ☐ Other: _____

Target Geographic Region:

☒ W

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

If yes, please supply 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?

Y 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: See TGIUVF

- ☐ Latest 990 or 990-PF
- ☐ 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

Applications are considered for approval by the executive committee or board of directors on a regular basis throughout the year.

Contact Consent

I understand that by providing the fax number(s) and email address(es) on behalf of

AAPA, I am authorized to and hereby consent for this organization to receive faxes and/or email messages sent on behalf of Philanthropy West Virginia

Signature

Date

Legal Assurance

I affirm to the best of my knowledge that our organization is in compliance with applicable state and federal regulations.

Authorized Signature

Date

Print Name

Title

DUES SCHEDULE:

Philanthropy West Virginia bases its dues on the average
of the previous two year's grantmaking.

Total grantmaking in last year: \$ 7000 for fiscal year ending: _____

Total grantmaking two years ago: \$ 4660 for fiscal year ending: _____

Average grantmaking during previous two years \$ _____

<u>Average Grantmaking</u>	<u>Dues Level</u>
<i>Public Grantmaking, Community Foundations, Giving Circles, and United Ways (In-State)</i>	
\$1 -- \$100,000	\$250
\$100,001 -- \$500,000	\$500
\$500,001 -- \$1,000,000	\$750
\$1,000,001 -- \$2,500,000	\$1,000
\$2,500,001+	\$2,500
<i>Community Foundation affiliates and geographic funds</i>	
<i>Affiliates & Area Fund Rates</i>	\$100.00
<i>Public Grantmaking & Community Foundations (Out of State)</i>	
<i>Minimum dues, grantmaking less than \$500,000</i>	\$1,000
\$500,001 -- \$750,000	\$2,500
\$750,001 -- \$1,250,000	\$4,000
\$1,250,001 -- \$5,000,000	\$5,500
\$5,000,001+	\$7,500

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

Please mail completed application and payment to:

Philanthropy West Virginia
P.O. Box 1584
Morgantown, WV 26505
T: 304-517-1450
www.PhilanthropyWV.org



Membership Criteria

Philanthropy West Virginia members must have grantmaking as their primary focus of activity. Such grantmaking activity must be regular, systematic, accessible to the public, and open to a reasonable range of nonprofit organizations.

The following are eligible for membership in Philanthropy WV:

- Independent Foundations
- Community Foundations
- Corporate Foundations/Giving Programs
- Family Foundations
- Donor Advised Funds
- Federated Funds
- Government Agencies
- United Ways
- Organized Giving Circle
- Associate Member:
 - Law Firm
 - Bank Trust Department/Wealth Management Division
 - CPA/Accounting Firm
 - Bank
 - Grantmaker Service Provider

Other organizations with the primary purpose of grantmaking, which meet the following criteria, may be eligible:

1. The organization has a verifiable giving program in West Virginia.
2. The grantmaking program is a significant part of the organization's activities. As a guideline, grants awarded should make up at least 30% of the organization's total annual expenditures. (For corporate giving programs, the term "organization" refers to the corporate giving unit, not the entire corporation.)
3. The organization accepts applications, within its funding priorities, from the general public and does not restrict its giving solely to subsidiary chapters, member organizations or affiliates, or a single institution. The organization carries out a broad mission of philanthropy with greater than 50% of the organization's grant allocations awarded to *unrelated* organizations or greater than 50% to programs that support the greater nonprofit community.
4. The organization has awarded grants for a minimum of one year immediately prior to submitting an application for membership. (If less than one year, the organization may be granted an associate membership.)
5. The organization's primary purpose for joining Philanthropy West Virginia is a desire to improve its grantmaking program.

In order for grantmakers to gain the most value from participation in Philanthropy WV, it is essential that Philanthropy WV members relate to their colleagues with both openness and confidentiality as they gather for Philanthropy WV programs, like those related to the discussion of issues impacting their work, professional development sessions, and networking. Members should not use Philanthropy WV as a means to advance organizational fundraising or related business concerns, and Philanthropy WV staff will not advocate with members for fundraising purposes, other than those directly related to Philanthropy WV.