



Association of Charitable Foundations

MEMBERSHIP APPLICATION FORM

ORGANISATION DETAILS

Name of organisation: _____

Office address: _____

_____ Postcode: _____

Tel: _____ Fax: _____

Email: _____ Website: _____

GRANT-MAKING

Does your organisation make grants for charitable purposes? YES / NO

Is grant-making your organisation's principal function? YES / NO

If grant-making is a subsidiary function, please indicate its importance in your organisation's work (see Note 1)

What was your organisation's expenditure on grants in the last financial year? £_____ in 20___/___

What is your organisation's main source of income? (If there is more than one source, please indicate the proportions from each source) _____

**PLEASE ATTACH A COPY OF YOUR MOST RECENT ANNUAL REPORT AND ACCOUNTS
AND A GRANTS LIST (IF PUBLISHED SEPARATELY)**

SUBSCRIPTION DETAILS

Are you applying for: Full membership Associate membership

Enclosed is a cheque for (see attached sheet for current subscription rates) £_____

The above organisation supports the objects of the Association of Charitable Foundations and wishes to become a member in the category stated.

Signed: _____ Capacity in which signing: _____

Name: _____ Date: _____

Contact name, address and telephone number if different from above: _____

Association of Charitable Foundations, 5th Floor, Central House, 14 Upper Woburn Place, London WC1H 0AE

ACF is a charity registered in England and Wales and a company limited by guarantee.

Company registration number: 5190466; Registered charity number: 1105412

NOTES

1. Membership categories

Full membership is for UK organisations in which grant-making is the principal function.

If grant-making is a subsidiary function, then **associate membership** is the appropriate category.

If grant-making is one of several functions, but not obviously 'principal' or 'subsidiary', please explain in a separate letter its relative importance in relation to other functions and give approximate percentages of your work in money or staff time.

Affiliate membership is a discretionary category available for organisations which administer or act as trustee for several grant-making bodies. Please contact ACF before filling out this application if you believe your organisation is eligible for affiliate membership.

ACF interprets the term grant-making to include investing for charitable purposes:

Examples of this might include, but not be limited to, the following activities undertaken for charitable purposes:

- Grants of money, or donations of assets or professional support;
- Investing via loans, equity-like capital and other social investment instruments;
- Investing directly or via partners to develop programmes of research, policy work or practical interventions.

Please contact ACF before filling out this application if your organisation invests for charitable purposes.

More detail of the conditions for full and associate membership is given in Notes 2 and 3 below.

2. Full membership

Full membership carries voting and other formal rights within ACF. Full members must fund a substantial part of their grant-making through income derived from endowment, property, or another assured source.

The following lists show what are regarded as assured and non-assured sources of income:

Assured sources	Non-assured sources
Interest and dividends on investments.	One-off or irregular donations from individuals and companies.
Rent from land or real property owned by the trust/foundation.	One-off public appeals.
Spending of capital	Payroll-giving, except where established over a long period.
Regular long-term donations, committed over at least three years, from one or more companies or individuals.	Government grants.
Well established periodic public appeals	Other grant-making trusts and foundations

Where a trust has several sources of income, at least 30% must be from assured sources to qualify for full membership.

3. Associate membership

Associate membership is for grant-making organisations which do not meet the conditions for full membership, because grant-making is not a principal function, their income is not assured, or they are based outside the UK. Associate membership is not available for organisations which are eligible for full membership. Associate members are entitled to participate in all ACF activities, except that they do not have a vote in formal processes.

4. ACF's objects

It is a condition of membership that a member should support ACF's objects, which are as follows:

The Association is established to further the work of charitable grant-making trusts and institutions for the public benefit by -

(1) advancing the education of the public in such trusts and institutions and carrying out research and publishing the results of such research;

(2) promoting the collective and individual effectiveness of such trusts and institutions and better methods of administration and management of their resources.

5. Application Procedures

Membership applications are considered by a special committee which meets frequently.

Once an application is approved, ACF will write to you providing full details of our services for members.

6. Subscriptions

Please see the attached sheet for current subscription rates.