



NEW MEXICO
ASSOCIATION OF
GRANTMAKERS

SUPPLEMENTAL MEMBERSHIP CRITERIA: Individual Grantmakers

Individual donors who operate grantmaking programs in accordance with the practices of organized philanthropy, who meet the criteria listed below, and who complete and present the required submissions are eligible for membership in New Mexico Association of Grantmakers.

Individual donors should submit the following:

- ◆ A fully completed application form.
- ◆ Information verifying the total dollar amount of grants made in your last complete year of grantmaking. This material could be in the form of a list of grants, an annual report, or a copy of the relevant sections of the individual's 1040 tax return (or appropriate supplemental forms).
- ◆ A letter signed by the individual donor or designated representative providing:
 - a) The purpose and goals of the grantmaking program including any limitation based on geography, subject matter of grants, or other factors.
 - b) Name, address and telephone number of person to contact about grant information.
 - c) A statement attesting that the grantmaking program was "significant" in the most recent fiscal year, and that the applicant expects the grantmaking program normally to meet these criteria in future years. For the grant program to be "significant":
 - 1) Direct grant program must be at least \$25,000 per year; and
 - 2) Grants must be made to a number of organizations.

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***Any material provided to New Mexico Association of Grantmakers
will be kept strictly confidential.***

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FOR MEMBERSHIP: Public Foundations (Public Charities)

Public foundations for which grantmaking constitutes a primary activity, that meet the criteria below, and that complete and present the required submissions are eligible for membership in New Mexico Association of Grantmakers.

Public foundations should submit the following:

- ◆ A fully completed application form.
- ◆ Evidence of tax exempt status under Section 501(c)(3): either
 - a) A copy of the latest Form 990 complete with all schedules; or
 - b) If Form 990 has not been submitted to the IRS, a copy of the Form 1023 may be substituted.
- ◆ IRS determination letter.
- ◆ A copy of the latest annual report, or a letter signed by an appropriate officer of the organization providing:
 - a) The goals of its grantmaking program including any limitation based on geography, subject matter of grants, or other factors;
 - b) Name, address and telephone number of person to contact about grant information.
 - c) A statement attesting that grantmaking and program expenses met the following criteria in the most recent fiscal year, and that they expect such expenses normally to meet these criteria in future years.
 1. The organization's annual grant expenditures (grants-related program costs, administrative costs for administering grants) must be equal to at least 50% of its annual budget.
 2. The organization's annual grant distributions are primarily made on a discretionary basis (e.g., not exclusively by a predetermined formula) to multiple organizations that are not subsidiary or related to the grantmaker.

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FOR MEMBERSHIP: Federated Funds

Federated funds are eligible for membership in New Mexico Association of Grantmakers, as long as grantmaking of a discretionary or competitive nature constitutes a significant part of their activity; they meet the criteria below; and they complete and submit the required submissions.

Federated funds should submit the following:

- ◆ A fully completed application form.
- ◆ Evidence of tax exempt status under Section 501(c)(3); a copy of the latest Form 990 complete with schedules and a copy of the IRS determination letter.
- ◆ A copy of the latest annual report.
- ◆ A letter signed by an appropriate officer of the organization providing:
 - ◆ The goals of its discretionary (competitive) grantmaking programs, including any limitations based on geography, subject matter of grants, or other factors, and the criteria for selection.
 - ◆ Name, address and telephone number of person to contact about grant information.
 - ◆ A statement attesting that discretionary grantmaking and related program expenses met the following criteria in the most recent fiscal year, and that they expect such expenses normally to meet these criteria in future years:
 - ◆ The organization's annual grant expenditures (grants related program costs, administrative costs for administering grants) must be equal to at least 50% of its annual budget.
 - ◆ That the discretionary grantmaking program is competitive, with a programmatic focus and is open to a wide variety of nonprofit organizations.
 - ◆ When completing the application form, federated funds should provide the total dollar amount of discretionary (competitive) grants made for the last complete fiscal year.

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