



COUNCIL *on* FOUNDATIONS

Associate Membership Application

SUBMITTER NAME		SUBMITTER TITLE	
ORGANIZATION NAME		EMPLOYER IDENTIFICATION NUMBER	
MAILING ADDRESS			
CITY	STATE	POSTAL CODE	COUNTRY
PHONE	FAX		
WEBSITE		E-MAIL ADDRESS	

MEMBERSHIP CLASSIFICATION [\(See Dues Calculator\)](#)

- ☐ Nonprofit Service and Support Organization or Entity
☐ For-Profit Service and Support Organization or Entity
☐ Bank or Trust Company

Year Established _____ Number of Staff _____ Number of Board Members / Trustees _____

FINANCIAL INFORMATION FOR THE MOST RECENT FISCAL YEAR

Fiscal Year Ending (MM/YY) _____ Dedicated Budget _____

CONTACT PERSONS

PRIMARY COUNCIL CONTACT	TITLE	E-MAIL ADDRESS	PHONE
DUES CONTACT	TITLE	E-MAIL ADDRESS	PHONE

BRIEF DESCRIPTION OF PROGRAMS AND SERVICES

MEMBERSHIP DUES CONTRIBUTION [\(See Dues Calculator\)](#)

\$ _____ ☐ Payment enclosed ☐ Please invoice me
Payment must be received within 30 days of the date of invoice.

Please note that checks are deposited upon receipt. The cashing of your check does not automatically accept your application for Associate Membership.

CERTIFICATION

WE CERTIFY THAT (PLEASE CHECK ALL):

- ☐ We will support and comply with the Council's Statement of Ethical Principles (listed below).
- ☐ We have a professional interest in charitable giving and agree to abide by the NCPG Model.
- ☐ We understand that information regarding an allegation of a violation of our profession's code of conduct or ethics may be shared with any professional credentialing organization to which the organization and/or the individuals listed above or subsequently added are subject.
- ☐ We understand that if the violation is substantiated, our Associate Membership will be terminated.
- ☐ We will promote the Council on Foundations' principles and practices for effective grantmaking when advising philanthropic clients.
- ☐ We have professional Errors and Omissions coverage in force of no less than \$1 million USD.
- ☐ We will update the Council on any changes pertaining to our professional affiliation, insurance coverage or a code of ethics violation. Failure to notify the Council or failure to maintain compliance with the above criteria may result in termination of Associate Membership.

PLEASE CHECK ONE OF THE FOLLOWING OPTIONS:

- ☐ We have not violated the code of conduct or ethics of any professional credentialing organizations to which either the organization or the individuals employed by our organization are subject.
- ☐ We have not had our organizational or individual investment advisor, securities, or insurance licenses or other professional credentials revoked or suspended by a state or federal licensing or regulatory agency.
- ☐ If we have been accused or found in violation of the code of conduct or ethics of a professional credentialing organization to which either the organization, or the individuals employed by our organization are subject or had organizational or individual investment advisor, securities, or insurance licenses or other professional credentials revoked or suspended by a state or federal licensing or regulatory agency, we will provide the Council with complete details. We understand that consideration of our Associate Membership may be delayed until a review of the situation is completed.

SIGNATURE OF PRIMARY COUNCIL CONTACT _____

DATE _____

QUESTIONS AND SUBMISSION

Please direct any questions about membership eligibility to the Council's Membership Department at 703-879-0645 or by e-mail to membership@cof.org.

Please submit your completed and signed application either by e-mail to membership@cof.org, by fax to 703-879-0802, or by mail to:

Council on Foundations
Attn: Membership Department
2121 Crystal Drive, Suite 700
Arlington, VA 22202 USA

Please save a copy of the completed application for your own records and please allow 2-4 weeks for processing.

Statement of Ethical Principles

The Council on Foundations and its members promote the highest standards of ethical behavior. In recognition of the importance of philanthropy toward the public good and those we serve, we adopt these ethical principles.

MISSION

Our members are committed to the public benefit and to their philanthropic purposes and act accordingly.

STEWARDSHIP

Our members manage their resources to maximize philanthropic purposes, not private gain, and actively avoid excessive compensation and unreasonable or unnecessary expenses. They pursue maximum benefit through their work, how they work and by supporting the work of partners, colleagues and grantees.

ACCOUNTABILITY AND TRANSPARENCY

In carrying out their philanthropic activities, our members embrace both the letter and the spirit of the law. They welcome public interest, take responsibility for their actions and communicate truthfully.

DIVERSITY AND INCLUSIVENESS

Our members seek diversity and inclusiveness in order to reflect the communities they serve and to ensure that a range of perspectives contribute to the common good and the development of their mission in a changing society.

GOVERNANCE

Our members' governing bodies understand and embrace their responsibility to oversee the mission, strategic direction, finances and operations of their respective organizations, and do so honestly and with integrity. They establish clear and understandable policies and ensure that they are followed.

RESPECT

Members interact respectfully with grantees, colleagues, donors and peers.

Council on Foundations' Policy on Sanctioning Members

While Council members are committed to best practices and high standards of conduct, the Council is not an enforcement organization. Its interest is in protecting and preserving the public trust by encouraging ethically sound management of philanthropic institutions. This commitment to responsible and effective philanthropy led the Council's Board of Directors to establish specific procedures for invoking sanctions for possible or proven institutional misconduct by its members. This process strengthens the ability of the field to regulate itself and helps the Council fulfill its mission to educate its members about best practices and ethics in philanthropy. This and other efforts by grantmakers to monitor their own conduct will help prevent the need for further state and federal oversight and demonstrates the field's eagerness to comply with not only the letter of the law, but the spirit as well.

For the complete text of the Council on Foundations' Policy on Sanctioning Members, visit our membership section of the COF website: www.cof.org.