

MEMBERSHIP APPLICATION FORM

Please complete both sides of the form



ORGANISATION DETAILS

Name of organisation: _____

Primary contact name: _____

Address: _____

Postcode: _____

Tel: _____ Email: _____

Website: _____

Charity Commission/OSCR/CCNI registration number: _____

Please attach a copy, or provide an electronic link to, the following with your application:

- ☐ Governing document and list of current members of the governing body
- ☐ Most recent annual report and accounts and a grants list (if published separately)

GRANT-MAKING / INVESTING FOR CHARITABLE PURPOSES *[see Note 1]*

Does your organisation make grants and/or invest for charitable purpose? YES / NO

Is this your organisation's principal function? YES / NO

If this is a subsidiary function, please indicate its importance in your organisation's work

What was your organisation's expenditure on grants / charitable investment 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)* _____

MEMBERSHIP DETAILS

Are you applying for ☐ Full membership ☐ Associate membership ☐ Affiliate membership

[For details please see Note 1. Current subscription rates are on our website]

GOVERNANCE AND OPERATIONAL PRACTICE

ACF seeks assurance that all organisations accepted into membership are committed to complying with relevant legislation and adhering to the standards of governance and operational practice cited below.

Please review and tick to indicate whether your organisation meets these criteria:-

- ☐ The organisation has an active body of legally entitled and consenting trustees (or similar governing group) responsible for managing its affairs who are aware of the organisation's charitable objects and their duties and responsibilities in relation to the management of the organisation's assets, investments, and expenditure powers, in order to deliver the charitable outcomes for public benefit for which it has been set up.
- ☐ The organisation has appropriate procedures to manage conflicts of interest for trustees and staff.
- ☐ The organisation has appropriate procedures to ensure charitable activity and expenditure are properly authorised.

☐ Accounts are produced annually and where appropriate they comply with the Statement of Recommended Practice on Accounting by Charities (SORP).

The above organisation supports the objects of the Association of Charitable Foundations (see note 2 below) and wishes to become a member in the category stated.

Signed: _____ Capacity in which signing: _____

Name: _____ Date: _____

Once an application is approved, ACF will write to you with a membership welcome pack and an invoice for your membership fee.

Association of Charitable Foundations, Acorn House, 314-320 Gray's Inn Road, London WC1X 8DP
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

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

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;
- Using resources 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.

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. Where a trust/foundation has several sources of income, at least 30% must be from assured sources to qualify for full membership. The following table shows what are regarded as assured and non-assured sources of income:

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

Associate Membership

Associate membership is for grant-making organisations whose income is not assured, or who are based outside the UK, or where grant-making is a subsidiary function. Associate membership is not available for organisations which are eligible for full membership.

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.

Associate members are entitled to participate in all ACF activities, except that they do not have a vote in formal processes.

Affiliate membership

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.

2. 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.