New Jersey Cultural Trust

Guidelines for Becoming Designated a Qualified Organization

What is the New Jersey Cultural Trust?
Established by The New Jersey Cultural Trust Act (N.J.S.A. 52:16A-72 et seq.), the Trust was created to build a permanent, stable, and additional source of funding to support private, non-profit arts, history, and humanities organizations. The Trust's purpose is to help build endowments, strengthen institutional stability and capacity, and fund capital projects.

What does it mean to become designated a "qualified organization"?
The New Jersey Cultural Trust Board votes to designate organizations as "qualified." This means that the Board has determined that the organization meets the requirements set forth in the Act to participate in and benefit from the Cultural Trust programs. Individual grant programs offered by the Cultural Trust may include additional eligibility requirements in addition to qualification.

Why should I apply to become designated a qualified organization by the Cultural Trust?
Designation as a qualified organization is required to take advantage of funding opportunities provided by The New Jersey Cultural Trust. You can learn more about the Cultural Trust's funding opportunities by visiting the Cultural Trust's website.

What are the requirements and eligibility criteria to become designated a qualified organization?
To become designated a qualified organization, an organization must complete the online application form and submit it to the Cultural Trust for consideration. The Trust reserves the right to require any additional information needed to make the determination. In order to become qualified, an organization must meet the following criteria:
- Be a separately incorporated non-profit organization
- Be tax-exempt under the Internal Revenue Code of 1986
- Be incorporated for a minimum of four years and in operation for at least four consecutive years prior to applying
- Have a primary mission to promote the performing, visual and creative arts in New Jersey or to promote or preserve history and humanities in New Jersey
- Be in good standing with NJ Charities Registration and Division of Revenue filings
- Have a functioning board that provides financial oversight to the standards set by the Cultural Trust

How does the Cultural Trust define arts, history, and humanities?
- "Performing, visual and creative arts" shall include, but not be limited to, music, theater, dance, literature, painting, sculpture, architecture, photography, film art, handicrafts, graphic arts and design.
- "History" is the study of the human past as it is constructed and interpreted with artifacts, written evidence, and oral traditions. The work of history shall include, but not be limited to, research, teaching, and publication; the collection, preservation, and exhibition of historical

documents, oral traditions, artifacts, and sites; the dissemination of historical records and information; the creation and presentation of historical programming; and the broadening of historical knowledge.

- The term "humanities" shall include, but not be limited to, the study and interpretation of the following: languages; linguistics; literature; history; jurisprudence; philosophy; archaeology; comparative religion; ethics; the history, criticism, and theory of the arts; those aspects of the social sciences which have humanistic content and employ humanistic methods; and the study and application of the humanities to the human environment.

What types of organizations are not eligible to become qualified by the Cultural Trust?
Private, State, county, or municipal colleges and universities are not eligible. State, county, or local governmental units, authorities or corporations created by such units and "qualifying governmental bodies" as defined in N.J.S.A. 52:16A-26.2 are not eligible.

How long does the designation as a qualified organization last? Does my organization ever need to reapply?
Once designated a qualified organization, the status lasts for three years. After the three years elapses, the organization must reapply for qualification. The process to renew qualification is identical to the process for initial qualification.

How do I apply to become qualified?
Complete the online application on the Cultural Trust's website. NOTE: *You will not be able to save the application and return to it later.* Please only begin the application once you have assembled all of your application materials, including the Qualification Application Certification Form (page 6 of this PDF) with your authorizing board member's signature. A checklist of the contents of the application form and the required attachments are included in this document. Review them carefully before beginning the online application.

Is there a deadline to apply to become qualified?
Applications for designation as a qualified organization will be accepted on a rolling basis and will be forwarded to the Cultural Trust Board for its consideration at the first available opportunity. Cultural Trust grant programs do require applicants to become qualified before the grant deadline. In the case of an impending grant deadline, the final opportunity for organizations to become qualified ahead of the grant deadline will be publicized in the grant guidelines.

What happens if I submit an incomplete application?
Due to the high volume of submissions, only applications that are complete and meet core eligibility criteria will be presented to the Cultural Trust Board for consideration. Cultural Trust staff will notify applying organizations of missing or incomplete materials, and provide a reasonable opportunity for applicants to supply or complete the materials in question. An incomplete application must be completed no later than six months after the date the Cultural Trust reviews it. After six months, an application that remains incomplete will be deemed ineligible for consideration. At or after that time, the organization may submit a new application, with all required attachments, for consideration.

How do I ask questions about the qualification process or the New Jersey Cultural Trust?
You can contact the Cultural Trust's staff with any questions or for application assistance:

        Phone: 609-292-6403   Email: cultural.trust@sos.nj.gov

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New Jersey
Cultural Trust

Online Qualification Application Checklist

The following checklist represents the contents of the online qualification application. **Once you begin the online application, you will not be able to save it and return to it later.** Only begin the application once you have assembled all of your application materials, including a Qualification Application Certification Form (page 6 of this PDF) signed by a member of your board. Please complete this checklist to ensure you have prepared all required information and documentation before you begin the online application.

Applications will not be accepted in hard copy. This checklist is only intended to help you prepare to apply online. Once you have reviewed the eligibility criteria and assembled your application materials, go to the Cultural Trust's website to complete and submit the online application.

Components of the online qualification application:

☐ Organization's legal name and DBA or FKA (if applicable)

☐ Organization's general contact information
- General mailing address
- Website address
- General phone number
- General email (optional)
- County in which the organization is primarily located

☐ Date of incorporation

☐ Number of consecutive years operating

☐ Fiscal year end (e.g., Dec. 31)

☐ NJ Legislative District #
- Find your NJ Legislative District here.

☐ Congressional Legislative District #
- Find your Congressional Legislative District here.

☐ Checklist confirming organization has a primary mission in New Jersey
- You must meet at least two of the four below numbered criteria in order to be eligible for Board consideration:

  1. The organization maintains a primary location is in New Jersey OR more than 50% of the organization's staff is based in New Jersey.

  2. More than 50% of the organization's audience is composed of New Jersey residents.

  3. More than 50% of the organization's budget is expended in New Jersey.

  4. More than 50% of the organization's programming occurs in New Jersey.

☐ Principal contact information (this person will receive all automated emails related to this application, including requests for revision)
- First and last name
- Position/title
- Direct phone number
- Direct email

☐ FEIN (Federal Employer ID #)
- This is the number assigned to you by the federal government. You use this number for your IRS Form 990 filings. It is nine digits.

☐ IRS letter of determination (**upload 1 file**)
- A copy of the organization's IRS tax determination letter as proof of organization's tax-exempt, 501(c) status from the Internal Revenue Service.

☐ New Jersey Charities Registration #
- This is the number assigned to you by the NJ Division of Consumer Affairs, Charities Registration Division. It is a seven-digit number beginning with "CH." You can search for your Charities Registration number and file standing in the Directory of Registered Charities here.

☐ Charities Registration file standing
- Charities Registration is required. Your file standing *must* be "Compliant" in order to become qualified. If you need help registering or rectifying a non-compliant file standing, please contact Charities Registration at charitiesportalsupport@dca.njoag.gov.

☐ New Jersey Division of Revenue and Enterprise Services (DORES) Entity ID#
- This is the number assigned to you by the NJ Division of Revenue and Enterprise Services (formerly known as the Division of Commercial Recording) at the time of your incorporation and business registration. It is a ten-digit number usually beginning with a zero. You can search for your entity ID number here.

☐ DORES proof of good standing (**upload 1 file**)
- Proof of organization's active good standing with the NJ Division of Revenue and Enterprise Services, (e.g. a business standing certificate or a copy of organization's most recent certificate of annual report filing). Learn more about Division of Revenue and Enterprise Services filings here.

☐ Organization's board-adopted mission statement
- The organization's board-adopted mission statement clearly identifying the organization as one with a *primary* purpose of arts, history, or humanities.

☐ Statement of primary purpose
- A short written statement (not more than 1,500 characters, including spaces) explaining how the organization's mission and activities demonstrate a *primary* purpose of arts, history, or humanities (see pages 1 and 2 of this PDF for the Cultural Trust's definitions of these disciplines). Factors that may contribute to an organization's eligibility include:
  o The majority of the organization's programming consists of arts/history/humanities programming and/or services.
  o The majority of the organization's audience is driven by arts/history/humanities programming.
  o The majority of the organization's earned income comes from art/history/humanities-based programs and services.
  o The majority of the organization's expense budget supports arts/history/humanities-based programs and services.

☐ Year 1 summary of organization activities (**upload 1 file**)
- Summaries of the organization's activities describing major programs and services (e.g. published annual reports about programming, reports sent to annual grant funders, reports delivered to the Board of Trustees, or bullet-pointed lists, etc.)

☐ Year 2 summary of organization activities (**upload 1 file**)

☐ Documentation of organization activities (**upload no more than 5 files**)
- Documentation for the public, such as event calendars, brochures, email blasts, educational outreach materials, or performance and exhibition calendars, that support the organization's mission and verify its services to the public. Please upload no more than five pieces.

☐ List of current board members (including officer positions) (**upload 1 file**)
- Full list of current board members with officers identified

☐ Board meeting minutes — most recent budget approval (**upload 1 file**)
- The minutes of the board meeting at which the organization's most recent annual budget was approved.

☐ Year 1 financial documentation (**upload 1 or 2 files**, depending on budget size)
- Certified independent audit for the organization's most recently completed fiscal year, or:
  o <u>Organizations with annual gross contributions of less than $1 million and no endowment or endowment holding in excess of $100,000 may instead provide:</u>
    - a copy of the organization's tax return (i.e., Form 990s) for the most recently completed fiscal year;
    - <u>*and*</u> the organization's most recent annual budget as approved by the organization's board of directors.
  o <u>Organizations with annual gross contributions of less than $25,000 and no endowment or endowment holding in excess of $100,000 may instead provide:</u>
    - the organization's most recent annual budget as approved by the organization's board of directors.

☐ Year 2 financial documentation (**upload 1 or 2 files**, depending on budget size)
- Certified independent audit for the organization's *second* most recently completed fiscal year, or:
  o <u>Organizations with annual gross contributions of less than $1 million and no endowment or endowment holding in excess of $100,000 may instead provide:</u>
    - a copy of the organization's tax return (i.e., Form 990s) for the *second* most recently completed fiscal year;
    - <u>*and*</u> the organization's *second* most recent annual budget as approved by the organization's board of directors.
  o <u>Organizations with annual gross contributions of less than $25,000 and no endowment or endowment holding in excess of $100,000 may instead provide:</u>
    - the organization's *second* most recent annual budget as approved by the organization's board of directors.

- <u>NOTE</u>: For organizations submitting annual budgets, a budget must be a complete planning document for the entire organization for an entire fiscal year, including both income and expenses

☐ Name and title of authorizing official (typically a staff member)

☐ Name and title of authorizing board member

☐ Qualification Application Certification Form signed by authorizing board member (**upload 1 file**; blank form on page 6 of this PDF)

Certification and Signatures: An authorizing official (typically a staff member) <u>and</u> an authorizing member of your organization's board must certify that all statements submitted in the application or provided as proof or corroboration of statements made in the application are, to the best of their knowledge and belief, true and accurate. These must be two different individuals. The person completing the form will upload a completed Qualification Application Certification Form signed by the authorizing board member. Then, the authorizing official (typically a staff member) will digitally certify, sign, and submit the online application form.

For uploads: The following file types will be accepted: .doc, .docx, .pdf, .jpg, .jpeg, .txt, .ppt, .pptx, .xls, .xlsx., .csv. Special characters, including periods, are not allowed in file names.

Unacceptable or unnecessary forms of documentation (please do not submit the following):
- Form ST-5
- Form CRI-200, Form CRI-300R, or Form CRI-400
- Letter of Compliance from Charities Registration
- Certificate of Incorporation
- IRS letter confirming EIN number, but not confirming 501(c) status

Qualification Application Certification Form

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Organization Name

Board Member Certification:

I the undersigned attest to and certify that all statements made with this submission or provided as proof and corroboration of statements made with this submission are to the best of my knowledge and belief true and accurate.

_____

Signature of Authorizing Board Member

_____

Printed Name of Board Member

_____

Title of Board Member

_____

Date