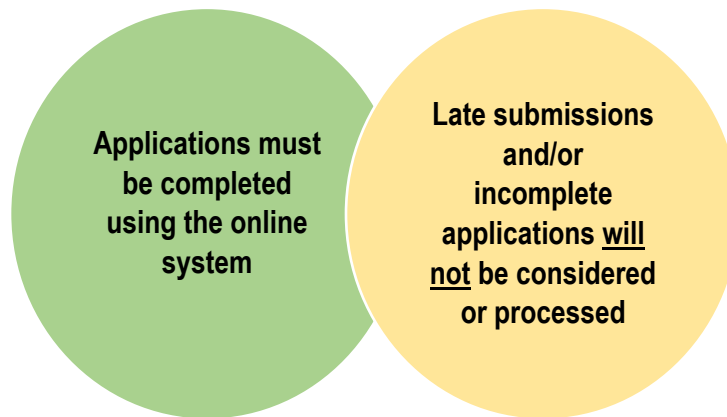




2019 ELIGIBILITY APPLICATION

DIRECTIONS & TIPS

SUBMISSION PROCEDURES



Please read through the directions in their entirety before beginning your application.

Eligibility applications must be received by **5:00 p.m. on Friday, September 6, 2019** for eligibility determination to be made prior to the 2020 grant cycle.

For questions or concerns about eligibility, please contact the SCFD office at scfd@scfd.org or call 303.860.0588.

NOTE:

A paper copy of the eligibility application is **NO LONGER REQUIRED** to be dropped off at the SCFD office.

NOTIFICATION OF ELIGIBILITY STATUS

Applicants will be notified of their eligibility status as follows:

- **Eligible for Funding:** SCFD will notify the organization in writing confirming its eligibility. If an organization meets all eligibility criteria, it may apply for funding in the upcoming grant cycle. Once eligibility has been granted, an organization should review <http://scfd.org/p/funding-process-overview.html> to become acquainted with the Tier III grant process. **Please note, eligibility does not guarantee funding.**
- **Ineligible for Funding:** If an organization *does not meet* specified eligibility criteria (see section 2 below), the organization will receive notification, in writing, regarding the areas that do not meet SCFD criteria for eligibility. If the organization believes the determination was in error, it should consult the SCFD Board Eligibility Appeal Policy found on the SCFD website: scfd.org.

ONLINE ELIGIBILITY APPLICATION

Organizations must use the internet-based application process. If you are having difficulties with the online application, please try using a different web browser. **Note:** Google Chrome has been the most successful web browser with the application. Firefox has had the most difficulty.

1. Go to the SCFD website, <http://scfd.org/p/directions-application.html> to access the application or click the link to go directly to the application: <https://app.wizehive.com/appform/login/scfdeligibility>
2. If it is your **first time logging in** to the Eligibility Application, you must **sign up** by entering your email address and password.
If you have **already created an account** for the Eligibility Application, please login to review/edit your application or fill in other requested information.
If you have created an account, but **forgot the password**, please click the “**Forgot Password**” button.
If you have **forgotten your login email**, please contact the SCFD office at scfd@scfd.org or 303.860.0588 and we can inform you of the email address you used to create an account. **SCFD staff cannot reset your password for you.**
3. Once logged in, you will be taken to the application.



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[NONDISCRIMINATION](#) | [ASSURANCES](#) | [REVIEW](#)

Eligibility Application

ORGANIZATION INFORMATION

Organization Legal Name * ?

Organization Legal DBA (doing business as)

Federal EIN (xx-xxxxxxx) * ?

TIP: Navigating in the Application

At the top of the page you can navigate between different sections of the application by clicking on the sections listed.



TIP: Help is Built into Application!

Hover over yellow question marks for more information regarding a section/question. After referring to the help text, call/email SCFD staff for clarification on any question.

The “**Save Draft**” button will save your work up to that point. This is particularly important if you plan to stop and return later to continue working on or complete the application.

The application automatically saves after approximately five minutes of inactivity, however it is always best to click “**Save Draft**” when you are finished working.

All uploaded documents must be in a .pdf file to be accepted.

TIP: Turn your files into.pdf for free:
<http://www.cutepdf.com/Products/CutePDF/writer.asp>

ELIGIBILITY CRITERIA

The Scientific & Cultural Facilities District statute outlines eligibility criteria applicable to all organizations seeking funding. **An organization must meet ALL the following criteria and must upload into the online system all the following corresponding documents to become eligible.**

SECTION 1: ORGANIZATION INFORMATION

All required information is noted with a red asterisk (*).

- **Organization Legal Name:** Should match Colorado Secretary of State records
- **Federal EIN:** Federal Employer Identification Number (FEIN) or the Federal Tax Identification Number, is a unique nine-digit number assigned by the Internal Revenue Service (IRS) to business entities operating in the United States for the purposes of identification.
- **Home County:** Select legal county that is registered with the Colorado Secretary of State.
- **Statutory Discipline:** Choose the SCFD statutory discipline(s) that best fits your organization. Check all boxes that apply.
- **Focus Area:** Choose the art form or scientific field that best fits your organization. Check all boxes that apply.
- **Official Physical Address:** Should match the registered address with the Colorado Secretary of State.
Note: This should not be a P.O. Box. A P.O. Box can be listed under the Secondary (Mailing) Address.
- Once all required information has been completed, click “**Next**” at the bottom of the page. All information will be saved and you will be taken to the next section.

SECTION 2: QUALIFYING/PRIMARY PURPOSE

A. Qualifying/Primary Purpose Requirement

Colorado Revised Statute §32-13-107(3)(b)(1)(A): The primary purpose of scientific and cultural facilities shall be **"enlightening and entertaining the public through the production, presentation, exhibition, advancement or preservation of visual arts, performing arts, cultural history, natural history, or natural sciences."**

The statute does not allow funding of:

- any agency of the state (including libraries)
- any educational institution, school or educational foundation
- any radio or television broadcasting network or station
- any cable communications system
- any newspaper or magazine
- any organization that is engaged solely in the acquisition or physical restoration of historic buildings, structures or sites

Key documents used to determine qualifying Primary Purpose:

1. **Compliance Statement:**

Please state in your own words how your organization meets SCFD's statutory requirement that the organization's primary purpose is *"enlightening and entertaining of the public through the production, presentation, exhibition, advancement or preservation of visual arts, performing arts, cultural history, natural history or natural sciences...."* Include one or more examples of how the organization meets these criteria. **Do not use the language in the statute verbatim.**

Also include Identified Barriers Statement, if applicable: If your organization has been denied eligibility in the past or has lost eligibility status, provide a written statement specifically explaining how the organization has overcome each identified barrier to eligibility as stated in your previous denial letter.
Please upload both the compliance statement and identified barriers statement as one pdf document.

2. Mission Statement:

Provide the organization’s mission statement as adopted by the Board of Directors and reported to the IRS.
Please indicate the date of adoption and the most recent review by the board of directors.

3. Governance: a. Articles of Incorporation, b. Bylaws, and c. Past 12 months of Board Meeting Minutes:

Provide a copy of the organization’s current articles of incorporation, current bylaws, any amendments to either, along with date of adoption, and **all** minutes from board meetings that occurred within the last 12 months. **Please note: Articles of Incorporation and Bylaws are usually two separate documents.** Please upload as one pdf document. Articles of Incorporation are not applicable to agencies of local government.

4. Activities List (see Appendix A):

An activities table template can be found on the online application or downloaded from the Eligibility page on the SCFD website here: <http://scfd.org/p/directions-application.html>. Please save it, complete it according to the directions below, and include it with the eligibility application. You may add rows as necessary. Please follow the example of an activities list format included as follows:

- List **all** the organization’s public and private activities during the last five fiscal years in chronological order. The submitted list must demonstrate that the organization has been serving the public through public activities for at least the past **60** months as of the Eligibility deadline. **Please provide the month, day and year of each event as well as the address.** Also list any planned/projected activities through the end of the current fiscal year.
- **Public activities should be noted with an asterisk.** Activities that serve the public generally include events open to the public such as: performances, outreach performances to schools and community centers, and classes. Examples of activities that are not considered mission-based public activities might include rehearsals, private events or parties, events during religious services, weddings/funerals, fundraising events, etc. These types of events should be detailed on the application; however as non-public events, they should not be noted with an asterisk. Board meetings should not be included on the activities list.
- **A thorough description of each event must be provided.** Also, indicate if any events are collaborations and the name(s) of any collaborating organization(s).
- Additional information regarding the event attendees’ county of residence may be requested, if that information is needed, to determine statutory compliance.

Date (mm/dd/yy)	Location (street address, city, county)	Event (name or type AND full description)	Number of People in Attendance
06/05/18	Buntport Theater, 717 Lipan Street, Denver, Denver	Japanese Film Night, “ABC” film debut; Screening and discussion with director *	35
07/08/18-07/10/18	Arvada Center, 6901 Wadsworth Blvd, Arvada, Jefferson	The Nutcracker; Modern ballet performance and demonstration with audience members; * Collaboration with ABC Dance Ensemble	200

Example Activities List

SECTION 3: TAX STATUS

B. Tax Status Requirements

5. Colorado Revised Statute §32-13-107(3)(b)(I)(A) or (3)(c)(I)(A): “Any such facility shall be a nonprofit organization that has a determination letter in effect from the IRS confirming §501(c)(3) status under the federal IRS Code of 1986”
 - **Tier II:** IRS Letter of Determination certifying 501(c)(3) must have been issued or re-issued within the last five years and the effective date of exemption must be at least **seven** years prior to date of eligibility application submission. Please note that years an organization spends under fiscal sponsorship of another organization do not count toward this requirement.
 - **Tier III:** IRS Letter of Determination certifying 501(c)(3) must have been issued or re-issued within the last five years and the effective date of exemption must be at least **five** years prior to date of eligibility application submission. Please note that years an organization spends under fiscal sponsorship of another organization do not count toward this requirement.
 - SCFD accepts eligibility applications from organizations with a **national affiliation that cannot acquire an in-state 501(c)(3) status**. They must:
 - Have Colorado incorporation, and
 - Be governed by a local board, and
 - Show proof of individual 990 tax filings, and
 - Not otherwise be able to obtain an individual tax status.

For Local Government Entities: Provide documentation of status as an agency of local government whose primary purpose qualifies. You must submit: a formal resolution creating the *cultural* or *scientific* entity, its special revenue fund (or similarly segregated fund) separate from the city/county's general fund, and the agency's purpose. For Tier III, the resolution adoption date must be at least **five** years prior to date of eligibility application submission (**seven** years for Tier II). Also provide documentation of the organization's structure and relationship with any related government entity.

SECTION 4: ORGANIZATIONAL AND FINANCIAL CAPACITY

C. Organizational and Financial Capacity Requirements

6. Colorado Revised Statute §32-13-106(2)(k) allows the SCFD Board to take into consideration, for initial and ongoing eligibility purposes, an organization's financial and organizational capacity to expend tax dollars to serve the public and achieve the mission of the organization.

Please upload the following required financial documents based on the organization type listed on the next page:

For Nonprofit Organizations with revenue under \$500,000

Please submit ALL the following:

- a) Submit IRS Form 990-EZ or 990, filed per IRS requirements, for most recently completed fiscal year (MRCFY). Include all schedules and 990-T if applicable.* **990N filings and 990 extensions will not be accepted.**
- b) Statement of Activities (P&L) for most recently completed fiscal year (MRCFY)* and Statement of Financial Position (Balance Sheet) for MRCFY* Submit these two documents as a single .pdf document.
- c) Current FY Statement of Activities (P&L) showing actual year-to-date revenue and expenses compared to Current FY Budget and Current FY Statement of Financial Position (Balance Sheet). Submit these two documents as a single .pdf document.

*See Appendix B of this application for financial definitions.

For Nonprofit Organizations with revenue between \$500,000 - \$750,000

Please submit ALL the following:

- a) Submit IRS Form 990, filed per IRS requirements, for most recently completed fiscal year (MRCFY). Include all schedules and 990-T if applicable.* **990 extensions will not be accepted.**
- b) A Financial Review for the most recently completed fiscal year (FY) compiled by an independent third party that includes Statement of Activities (P&L) and Statement of Financial Position (Balance Sheet) for MRCFY* Submit these two documents as a single .pdf document.
- c) Current FY Statement of Activities (P&L) showing actual year-to-date revenue and expenses compared to Current FY Budget and Current FY Statement of Financial Position (Balance Sheet). Submit these two documents as a single .pdf document.

*See Appendix B of this application for financial definitions.

For Nonprofit Organizations with Revenue over \$750,000

Please submit ALL the following:

- a) Submit IRS Form 990, filed per IRS requirements, for most recently completed fiscal year (MRCFY). Include all schedules and 990-T if applicable.* **990 extensions will not be accepted.**
- b) An Independent Audit for the most recently completed fiscal year (FY) compiled by a third party that includes Statement of Activities (P&L) and Statement of Financial Position (Balance Sheet) for MRCFY* Submit these two documents as a single .pdf document.
- c) Current FY Statement of Activities (P&L) showing actual year-to-date revenue and expenses compared to Current FY Budget and Current FY Statement of Financial Position (Balance Sheet). Submit these two documents as a single .pdf document.

*See Appendix B of this application for financial definitions.

For Agencies of Local Government

Please submit ALL the following:

- a) Statement of Activities (P&L) for cultural or scientific agency's MRCFY (local government general ledger or larger department financials will **NOT** be accepted for this requirement). Agency must provide P&L for their designated special revenue fund.
- b) Current fiscal year (FY) Statement of Activities (P&L) compared to Current FY Budget
- c) Documentation of any related governmental entity and/or foundation that provides in-kind or other support to the organization, if applicable.

7. **Board of Directors:**

Attach your Board of Directors List. Board list must be a .pdf and include all members with addresses and a description of the expertise each member brings to the organization. Please note if any board members are compensated, related to each other or to staff, or reside in the same household.

8. **Staff:**

Please attach a .pdf that lists key staff members, their positions, their email addresses, along with a brief description of each person's expertise and responsibilities. For smaller organizations with no paid staff, please include key volunteer positions. Note if any staff members are related or reside in the same household with other staff or board members.

SECTION 5: NONDISCRIMINATION STATEMENT

D. Nondiscrimination Requirements

9. The organization must have a *board approved* nondiscrimination policy that is **at least as inclusive** as SCFD's nondiscrimination statement. These protections should extend to all individuals with whom the organization comes into contact (employee, volunteer, program participant, patron, visitor or other). Indicate the date of adoption and its most recent review by the board of directors.

The Scientific & Cultural Facilities District does not discriminate against any person or organization based on age, race, sex, color, creed, religion, national origin, sexual orientation, transgender status, gender identity, gender expression, ancestry, marital status, gender, veteran status, military status, political service, affiliation or disability.

SECTION 6: ASSURANCES

All applicants must complete the Assurances section. The authorizing official, who is named at the bottom of the webpage, is responsible for the content in each assurance statement. The authorizing official should read the completed application and review all attachment before submitting the document.

- Read and answer all assurances that apply to the organization.
- Sign and date, then click "**Submit**" to submit your application.
- Make sure you review and make edits, if needed, prior to submitting your application.

- E. **Public Benefit Requirement** Colorado Revised Statutes §32-13-107(3)(b)(I)(B) and 107(3)(c)(I)(A) Funding must be used to support accessible programs and events with direct and measurable impact and must *principally* benefit the residents of the District. No attachments are required. Public Benefit requirement is determined based on organization's activities list, online preference, etc.

- F. **Geographic Requirements** Colorado Revised Statutes §32-13-107(3)(b)(I)(B) and 107(3)(c)(I)(B) No attachments are required. Geographic requirement is determined based on organization's primary address and activities list.

To be eligible an organization must:

- Have its principal office physically located within the Scientific and Cultural Facilities District, which excludes the towns of Castle Rock and Larkspur (Please note: a P.O. Box does not qualify as a physical address),
- Conduct a majority of its activities within the state of Colorado; and
- Offer activities that are accessible to and principally benefit the residents within the District.

QUESTIONS

SCFD Staff is available to help! Please contact the SCFD office if you have any questions or concerns regarding SCFD reporting or application procedures. Office hours are **Monday-Friday, 8:30am-5:00pm**.

Jessica Kato
Deputy Director
303.860.0588 x111
jessica@scfd.org

Dana Manyothane
Program Manager
303.860.0588 x112
dana@scfd.org

Heather Porter
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Kendal Zimmermann
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Joyce Chitechi
Office Manager
303.860.0588 x110
joyce@scfd.org

TIP: If you wait to contact us with questions the day or two prior to the eligibility deadline you are less likely to get an immediate response as contact volumes increase tremendously. Do yourself a favor, start the application process early.

*Some tools that SCFD uses to gauge organizational and financial capacity include: IRS regulations and filing requirements, the Colorado Nonprofit Corporation Act, the Colorado Secretary of State Business and Licensing Divisions' filing requirements, the Colorado Nonprofit Association's Principles & Practices for Nonprofit Excellence in Colorado, Generally Accepted Accounting Principles and Generally Accepted Auditing Standards.

SCFD may request updated or additional information. Please note all facets of the application are looked at in their entirety and required documentation can be used in determining multiple eligibility factors.

CHECKLIST

YEAR: _____

LOGIN INFORMATION

Username: _____ Password: _____

QUALIFYING / PRIMARY PURPOSE

- 1. Compliance Statement & (if applicable) Identified Barriers Statement
- 2. Mission Statement
- 3a. Articles of Incorporation (not applicable for agencies of local government)
- 3b. Bylaws
- 3c. Board Meeting Minutes
- 4. Activities List (use template provided in Eligibility Directions)

TAX STATUS

- 5. IRS Letter of Determination (nonprofits) OR Official Resolution (local governments)

ORGANIZATIONAL AND FINANCIAL CAPACITY

Nonprofit Financials

- 6a. Mostly Recently Filed 990-EZ or 990 per IRS requirements. Include all schedules and 990-T, if applicable.
- 6b. Financials (Profit & Loss and Balance Sheet) for Most Recently Completed Fiscal Year. (Based on organization size, see page 7 of Eligibility Directions for requirements).
- 6c. Financials (Profit & Loss and Balance Sheet) for Current Year-to-Date vs. Current Fiscal Year Budget

Agency of Local Government Financials

- 6a. Statement of Activities (Profit & Loss) for Most Recently Completed Fiscal Year (MRCFY).
- 6b. Statement of Activities (Profit & Loss) for Current Year-to-Date vs. Current Fiscal Year Budget
- 6c. Documentation of any related governmental entity and/or foundation that provides in-kind or other support to the organization, if applicable.

- 7. Board of Directors List
- 8. Staff List

NONDISCRIMINATION

- 9. Nondiscrimination statement and date of adoption

APPENDIX B: FINANCIAL DEFINITIONS

Definitions:

- **Form 990 or 990 EZ** is an annual reporting return that federally tax-exempt organizations must file with the IRS. Depending on the version of the form, it provides information on the filing organization's mission, programs, and finances. 990N forms are not accepted for SCFD eligibility.
- **Statement of Financial Position, also called a Balance Sheet:** This document is a snapshot of an organization's financial position and reports that financial position as of a specific date, e.g. July 31, 2016, rather than over a period of time. Items reported on the balance sheet are limited to: assets, liabilities, and net assets or fund balance. A balance sheet records the status of an organization's resources at a given point in time (often at the fiscal year end date).
- **Statement of Activity, also called a Profit and Loss Statement, a Statement of Revenues and Expenditures, or an Income Statement:** This document shows an organization's activities over time, e.g. one month or one year, rather than at a particular moment in time. This document records the activities of earning revenue or expending resources. This document reports only two items: revenue and expenses; although it may compare budgeted to actual, e.g. budgeted revenue to actual revenue or budgeted expenses to actual expenses.
- **Financial Review:** The objective of a financial "review" conducted by an independent auditor is to examine the nonprofit's financial statements and determine whether the financial statements are consistent with generally accepted accounting principles. A review shares the goals of an audit; however, a review is not conducted with the same level of investigation, analysis, or cost as an independent audit.
- **Independent Audit:** An independent audit is an examination of the financial records, accounts, business transactions, accounting practices, and internal controls of a charitable nonprofit by an "independent" auditor.

Please Note: These documents are required for your application to be complete. If you are unsure your organization is recording financials according to nonprofit standards, you can search these terms on the internet to find templates for comparison. All submitted financials must adhere to Generally Accepted Accounting Principles (GAAP).