



**2021 SCFD
Eligibility Application
Directions & Tips**

TABLE OF CONTENTS

ELIGIBILITY SUBMISSION	2
TO ACCESS	3
NAVIGATING THE GRANT APPLICATION PORTAL	5
NOTIFICATION OF ELIGIBILITY STATUS	6
ELIGIBILITY CRITERIA	7
QUALIFYING PRIMARY PURPOSE	7
TAX STATUS	9
ORGANIZATION AND FINANCIAL CAPACITY	10
NONDISCRIMINATION STATEMENT	12
ASSURANCES	12
QUESTIONS AND CONTACT INFO	13
APPENDIX A: FINANCIAL DEFINITIONS	14

2021 ELIGIBILITY SUBMISSION PROCEDURES

To be considered for funding, an organization must be an SCFD eligible organization.

Organizations must use the Fluxx online grants management portal to submit their Eligibility Application. If you are having difficulties with the online system, please try using a different web browser (Chrome is recommended) or contact SCFD Staff for support.

TO ACCESS

1. Go to the SCFD website for all instructions and to access Fluxx:
<https://scfd.org/grantmaking/getting-started/is-scf-d-for-you/>
Or click this link to go directly to the application: <https://scfd.fluxx.io>
2. Create an organization profile in the SCFD Fluxx Grant Portal by clicking on the “Create an account now” button.
 - a. This will direct you to take an Initial Eligibility Quiz. Complete the Eligibility Quiz by selecting your answers to the questions and hit “Submit.”
3. If your organization meets the minimum requirements to submit an eligibility application, a new page will open to allow you to create an account by entering preliminary organizational information. Once you have completed all the requested information, click “Submit Request.”

ORGANIZATION INFORMATION

*Note: **Bold** fields in the form are required.*

- a. ***Organization Type:** Select your organization type from the drop-down menu.
- b. **GuideStar Ein Profile Lookup:** Enter your Federal Employer Identification Number (EIN) in the Guide Star EIN Profile Lookup. This 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 (Fluxx will auto-populate the form with the organization’s registered profile information from Guide Star).

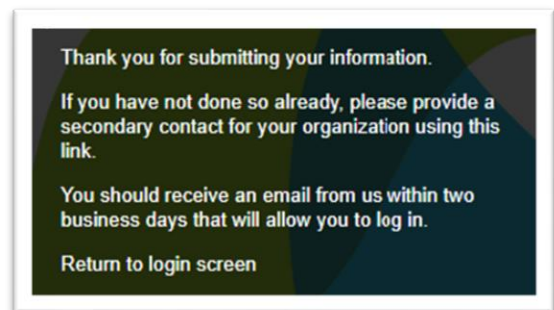
If you do not have an organization profile listed in Guide Star, you will be able to enter your EIN under “Tax ID” below.

- c. ***Organization Legal Name:** Enter your Organization Legal Name. This should match Colorado Secretary of State records.
- d. **Organization Legal Doing Business As (DBA):** Enter your Organization’s Legal Doing Business As (DBA). This should be registered with the Colorado Secretary of State as a tradename of your organization. (optional)
- e. **Website:** Enter your organization’s website address here, if applicable.
- f. ***Tax ID:** Enter your Tax ID. This is your EIN and will be auto populated if you used the GuideStar EIN Profile Lookup above.
- g. **Tax Class:** Select your organization’s tax class. You need to be a 501c3 IRS classification to apply for SCFD eligibility. If you are an agency of local government, leave blank.
- h. **Home County:** Select your organization’s home county. This is the county associated with your registered primary address with the Colorado Secretary of State. This can be a PO Box but typically is a physical address.
- i. **Mission Statement:** Enter your organization’s mission statement. Please include date of adoption and most recent by the board.

- j. **Statutory Discipline:** Click on the statutory discipline(s) that best fits your organization and move them to the right-side column using the > arrow.
- k. **Focus Area:** Click on all focus area(s) that best fit your organization and move them to the right-side column using the > arrow.
- l. ***Primary Address:** Enter your principal street address. This should match the registered address with Colorado Secretary of State. **Note: This should not be a PO Box. A PO Box can be listed under the secondary (mailing) address.**
- m. **Secondary (Mailing Address):** Enter your secondary (mailing) address, if applicable.
- n. **Primary Contact Info:** Enter your organization's primary contact information. This will be the person who will receive all communication from SCFD.

Once you have completed all the requested information, click "Submit Request."

- 4. After you submit, this screen will pop-up. Click on "this link" to add a secondary contact person to your organization. If you do not have a secondary contact, you have completed your organization's account setup. Proceed to Step 5.



ADDING SECONDARY CONTACT

- a. ***Organization Legal Name:** Enter your organization legal name again as it appears in your initial registration to "connect" your secondary contact to your organization's profile.
 - b. **Additional Contact:** Proceed with entering information requested for your secondary contact. Click "Submit Request."
- 5. SCFD staff will now review your request and will either validate or invalidate your profile. This can take up to two business days. You will not be able to make any changes to your account during this time.
 - a. If your account is validated, you will receive an email from "do-not-reply.grants07-us-east-1@fluxx.io" asking you to setup your password. Please add this email address to your safe sender's list.
 - 6. Once your organization has been validated, and you have created your password, you can return to the main Fluxx grant portal via *Step 3: Apply for Eligibility on the "Is SCFD for You"* page to log into your Fluxx account. If you have any issues trying to login, please contact SCFD Staff.
 - 7. If you have **forgotten your user login email**, please contact the SCFD office. **Do not** create a new user account with a different email address as organization accounts are associated with your email used when first accessed the system.

8. If you do not remember your password, click “Reset or create password.” You will be prompted for your email address. If your email address is registered to an active account in Fluxx, you will receive an email prompting you to reset your password.
9. If you do not receive a password reset email from Fluxx, your email address might not be registered in our system. Contact SCFD staff for assistance.

Please Note: Each person who logs in on behalf of an organization will have their own user profile. Only one user can edit your organization profile card at a time.

NAVIGATING THE GRANT APPLICATION PORTAL

After you have logged into the Fluxx grant portal, use the navigation menu on the left side of the page.

1. Click on the “People” tab in the navigation menu on the left side of the page. Review your contact information for accuracy and completeness. You may change anything by clicking on the “Edit” button in the top right corner. Be sure to “Save” any changes.
2. **To apply for eligibility**, you must complete the organization card in your Fluxx profile. Click on the “Organization” tab in the navigation menu on the left side of the page. This will bring up your organization card. Click on your organization card then click the “Edit” button on the top right corner of the page.
 - Note: If you need to update any of the following in your Organization Profile, email scfd@scfd.org.
 - Organization Legal Name
 - Organization Legal Doing Business As
 - Tax ID
 - Tax Class
 - You will need to provide the 12 required attachments in the “Organization Audit” section.
 - Click the **“Save and Continue” or “Save and Close”** button at anytime to save any information entered into the application.
 - Note: The portal does not autosave; therefore, you must click the **“Save and Close”** button to ensure your attachments are saved and not lost.
3. **Application Attachments**
 - To upload the required 12 attachments, you will click on the blue + button on the right side of each required document.
 - Fluxx accepts attachments in Word, Excel, and PDF formats. Please ensure your attachments are properly labeled (as this is an organizational audit) and include your organization name and attachment title.

4. Continuing/editing your Eligibility Application

- To go back to your application at any time, go to “Organization” in the navigation menu. Then click the “Edit” button on the top right of your application.

All attachments are required **must be completed**. Any application missing information will be considered incomplete and will not be accepted.

If you need additional support after reading the directions and watching the tutorial(s) located on the [Is SCFD For You](#) webpage, call/email SCFD staff for support.

Late submissions and/or incomplete applications will not be considered or processed.

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

Eligibility applications must be completed by
4:00 p.m. on Friday, September 10, 2021
for determination prior to the 2022 grant cycle.

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

NOTIFICATION OF ELIGIBILITY STATUS

Applicants will be notified of their eligibility status as follows:

- **Eligible for Funding:** SCFD will notify the organization via email 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 <https://scfd.org/grantmaking/funded-organizations/tier-iii/> 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, the organization will receive notification via email regarding the areas that do not meet SCFD criteria for eligibility. If the organization believes the determination was made in error, it should consult the SCFD Board Eligibility Appeal Policy found on the SCFD website: scfd.org.

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 include all the following corresponding documents to their assigned Dropbox folder to become eligible.**

QUALIFYING/PRIMARY PURPOSE

A. Qualifying/Primary Purpose Requirement

Colorado Revised Statute §32-13-107(3)(b)(I)(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 document.

2. 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.

- **Local Government Entities:** Please provide documentation of the organization's structure and relationship with any related government entity.

3. Activities and Attendance Attachment:

An activities and attendance template can be found on the online application or downloaded from the Eligibility page on the SCFD website here:

<https://scfd.org/grantmaking/getting-started/is-scf-d-for-you/>. Please save it, complete it according to the directions below.

Please follow the instructions on the attachment template and be sure to include:

- the name of your organization
- your most recently completed fiscal year
- List **all** the organization's public and private activities during the last five fiscal years in chronological order starting with the oldest. 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. Also list any planned/projected activities through the end of the current fiscal year.
 - Please include any canceled programming due to COVID. Simply write CANCELED in column E (Number of activities/occurrences).
- Additional information regarding the event attendees' county of residence may be requested, if that information is needed, to determine statutory compliance.
- Please upload your Activities and Attendance Attachment as an **excel spreadsheet**.

Detailed Activities and Attendance Attachment should include:

- **Date(s)** - This can include an individual day or a series of dates.
- **Name of Activity(ies)** - Provide a detailed title and description for the activity.
 - **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).
- **Location of Activity(ies)** - Provide the name of the venue where the activity took place. If your programming was virtual, this is the location of where it was recorded, streamed, or created from. If your virtual creation is from multiple locations, you must make a reasonable determination of its origin (e.g., where MOST of it took place).
- **County** - Indicate the county where the activity(ies) took place. If outside of SCFD, only enter either Colorado outside SCFD or Outside Colorado.
- **Number of Activities** - Enter the total number of activities that occurred in each county.
- **Was this virtual/online? Y/N** - If it was online programming enter Y, if in-person enter N. If your program was a hybrid (i.e., both online and in-person), list the program twice noting one for online and one for in-person and split

attendance accordingly. If you have several days of virtual attendance programming then each day is counted as one (e.g., if you leave a program up for 4 days of viewing, then you can count 4 activities).

- **Total Attendance at Activities** - Enter the total attendance where the activities took place. For virtual activities, list the total number of participants to the best of your ability.

Example Activities and Attendance Attachment

Date(s)	Name of Activity(ies)	Location of Activity(ies)	COUNTY	# Activities/Occurrences	Was this virtual/online? Y/N	Total Attendance
01/15/2020	Outreach Performance – collaboration with Colorado Ballet – free performance for Title I schools.	W Middle School, Aurora	Arapahoe	2	Y	123
04/20/2020	Kids Hour Sing-along	Canceled	Broomfield	0	N	0
06/15/2020	Broadway Sings at School (hybrid)	X High School, Littleton	Arapahoe	3	N	56
06/15/2020	Broadway Sings at School (hybrid)	X High School, Littleton	Arapahoe	3	Y	168
09/16/2020	Baroque Performance	Y High School, Colorado Springs	Colorado not SCFD	1	Y	56
12/16/2020	Holiday Songs Workshop	Z Middle School, Colorado Springs	Colorado not SCFD	3	Y	100
07/14/2020	Broadway Sings at School	W Elementary, Broomfield	Broomfield	4	N	115
08/14/2020	Broadway Sings at School	X Elementary, Austin, TX	Outside Colorado	1	Y	35
09/14/2020	Baroque Performance	Y High School, Laramie, WY	Outside Colorado	1	N	56
11/14/2020	Baroque Performance	Z Middle School, Highlands Ranch	Douglas	3	Y	100
12/14/2020	Holiday Songs Workshop	Z Middle School, Castle Rock	Colorado not SCFD	2	Y	144

TAX STATUS

B. Tax Status Requirements

- 4. Letter of Determination:** 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 any time spent under fiscal sponsorship of another organization does 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 any time spent under fiscal sponsorship of another organization does not count toward this requirement.*

Please note: SCFD does accept eligibility applications from organizations with a **national affiliation that cannot acquire an in-state 501(c)(3) status**. They must satisfy all the following:

- Incorporation in Colorado
- governed by a local board
- provide proof of individual 990 tax filings
- not otherwise be able to obtain an individual tax status

If you believe your organization falls under this category, please contact SCFD to confirm as you complete your application.

Local Government Entities: Provide documentation of status as an agency of local government whose primary purpose qualifies. You must submit:

- the formal resolution that created the *cultural* or *scientific* entity
- documentation of a special revenue fund (or similarly segregated fund) separate from the city/county's general fund
- 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).

ORGANIZATIONAL AND FINANCIAL CAPACITY

5. a, b, and c. Organizational and Financial Capacity Requirements

- 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 following 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 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 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 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 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 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 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

6. Board of Directors:

Attach your Board of Directors List. Board list. Board list must 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. If you are an agency of local government, attach your city council list.

7. Staff:

Please list 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.

NONDISCRIMINATION STATEMENT

8. Nondiscrimination Requirements

The organization must have a *board approved* nondiscrimination policy that is **at least as inclusive** as SCFD’s nondiscrimination statement (see below). These protections should extend to all individuals with all organizational stakeholders (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.

ASSURANCES

All applicants must complete the Assurances section under the Audit Documents. The primary contact is responsible for the assurance statements. This individual should read the completed application and review all attachment before submitting the document.

- Make sure you review and make edits, if needed, prior to submitting your application.

9. 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.

10. 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

Please contact the SCFD office if you have any questions or concerns regarding your eligibility application.

TIP: Start early!

Contacting SCFD Staff with questions the day or two prior to the eligibility deadline does not guarantee a response.

Jessica Kato

Deputy Director
303.860.0588 x111
jessica@scfd.org

Dana Manyothane

Program Officer
303.860.0588 x112
dana@scfd.org

Heather Porter

Program Officer
303.860.0588 x114
heather@scfd.org

Kendal Zimmermann

Program Officer
303.860.0588 x115
kendal@scfd.org

*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 aspects of the application are evaluated in their entirety and required documentation may be used to determine multiple eligibility factors.

APPENDIX A: 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 time period. 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: All financial documents are required for your application to be considered 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).