



# The New Jersey Cultural Trust

## Application to Become Designated a Qualified Organization

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### Guidelines

#### **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, create institutional stability, 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.

#### **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 following application 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 and operating 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 New Jersey history and humanities in New Jersey
- Be in good standing with NJ Charities Registration and Division of Revenue filings

#### **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 following application form and supply all of the required supplemental documentation. Be sure to complete and enclose the submission checklist. Mail the form and all attachments to the New Jersey Cultural Trust. Faxes, e-mails, and other digital formats are not acceptable submissions. All materials must be mailed. The outer envelope of the submission should be clearly labeled, "Qualification Application."

If sending by the United States Postal Service, please mail to:

The New Jersey Cultural Trust  
P.O. Box 305  
Trenton, NJ 08625

If sending by UPS, FedEx, or hand-delivering, send to:

The New Jersey Cultural Trust  
33 West State Street, 4<sup>th</sup> Floor  
Trenton, NJ 08625

**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 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.

Due to the high volume of submissions, applications that are incomplete or do not meet core eligibility criteria will be deemed ineligible and will not be presented to the Cultural Trust Board for consideration.

**How do I ask questions about the qualification process or the New Jersey Cultural Trust?**

You can contact the Cultural Trust's Executive Director with any questions or for application assistance:

Isabel (Izzy) Kasdin, Executive Director  
New Jersey Cultural Trust  
609-633-0522

[isabel.kasdin@sos.nj.gov](mailto:isabel.kasdin@sos.nj.gov)

Check out our website at [www.nj.gov/state/culturaltrust/index.html](http://www.nj.gov/state/culturaltrust/index.html)



**The New Jersey Cultural Trust  
Qualified Organization Designation Application Form**

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Please complete this application to be designated a “qualified organization” under the rules of The New Jersey Cultural Trust. You may submit this form at any time. Your application to be designated “qualified” will be considered at the next scheduled board meeting. Please see the guidelines above for specific instructions. **Please review the eligibility criteria carefully prior to submitting an application.**

Please note that all information submitted to The New Jersey Cultural Trust is subject to the Open Public Records Act and will be made available upon request for public access with the exception of materials exempted by law, executive order, or by rule.

**Legal name of organization:** \_\_\_\_\_

**DBA or FKA of organization (if applicable):** \_\_\_\_\_

**FEIN (Federal Employers 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.

**Charities Registration #:** \_\_\_\_\_ **Charities Registration File Standing:** \_\_\_\_\_

- 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 [here](#).
- Your file standing *must* be “Compliant” in order to become qualified. If it is not, contact Charities Registration to rectify.

**Division of Revenue and Enterprise Services Entity ID Number:** \_\_\_\_\_

- This is the number assigned to you by the NJ Division of Revenue and Enterprise Services 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](#).

**Mailing Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_ **County:** \_\_\_\_\_

**Main Phone:** \_\_\_\_\_ **General Email Address:** \_\_\_\_\_

**Date of Incorporation:** \_\_\_\_\_ **How many consecutive years have you been operating?** \_\_\_\_\_

**NJ Legislative District:** \_\_\_\_\_ **Congressional Legislative District:** \_\_\_\_\_

**Fiscal Year-End (e.g. Dec. 31):** \_\_\_\_\_ **Website Address:** \_\_\_\_\_

**Principal Contact:**

**Prefix (e.g. Dr., Ms., etc.):** \_\_\_\_\_ **Name:** \_\_\_\_\_ **Title:** \_\_\_\_\_

**Direct Phone:** \_\_\_\_\_ **Direct Email Address:** \_\_\_\_\_

*Application continues on next page*

**Please print and attach the following required documents:**

- Completed Submission Checklist (available on page 6 of this application PDF)
- A copy of the board-adopted mission statement clearly identifying organization as one with a primary purpose of arts, history, or humanities.
- Proof of organization's active good standing with the NJ Division of Revenue and Enterprise Services, formerly known as the Division of Commercial Recording (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](#).
- A copy of the organization's IRS tax determination letter as proof of organization's tax-exempt, 501(c)(3) status from the Internal Revenue Service.
- Summary of organization's activities for the *past* two years 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.)
- 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 send no more than five pieces.
- One of the following types of financial documentation, depending on the organization's budget size:
  1. Organizations with annual total gross income of \$500,000 or more, or with endowment or endowment holdings in excess of \$100,000: Certified independent audits for organization's past two completed fiscal years.
  2. Organizations with an annual budget in excess of \$25,000 but under \$500,000 and no endowment or no endowment holding in excess of \$100,000: Copies of organization's tax returns (i.e. Form 990) for the past two fiscal years *and* organization's past two annual budgets as approved by the organization's board of directors. If your organization conducts audits or independent financial reviews, you may instead submit those for the past two completed fiscal years.
  3. Organizations with annual budgets under \$25,000 and no endowments or no endowment holding in excess of \$100,000: Copies of organization's board approved annual budgets for the last two fiscal years.

Unacceptable or unnecessary forms of documentation (please do not submit the following):

- Form ST-5
- Form CRI-200, CRI-300R, or Form CRI-400
- Certificate of Incorporation
- IRS letter confirming EIN number, but not confirming 501(c)(3) status
- Qualification application guidelines/instructions (you need only submit the form and checklist pages)

*Application continues on next page*

**Certification:**

We 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 our knowledge and belief true and accurate.

**Two signatures are required.**

\_\_\_\_\_  
Authorizing Official's Signature

\_\_\_\_\_  
Authorizing Signature of Board

\_\_\_\_\_  
Printed Name of Authorizing Official

\_\_\_\_\_  
Printed Name of Board Member

\_\_\_\_\_  
Title of Authorizing Official

\_\_\_\_\_  
Title of Board Member

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

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## **Submission Checklist**

Only complete applications will be considered. Please complete this checklist to ensure you have included all required information and documentation. Consult page 4 of this application PDF for detailed explanations of these materials.

- Completed Submission Checklist
- Completed Application Form
- Signature #1 on Application Form (with name, title, and date)
- Signature #2 on Application Form (with name, title, and date)
- Confirmed Compliant NJ Charities Registration Status [here](#).
- Organization's Mission Statement
- NJ Division of Revenue and Enterprise Services Documentation
- IRS Letter of Determination
- Year 1 Summary of Organization's Activities
- Year 2 Summary of Organization's Activities
- Outreach Materials (no more than 5 pieces)
- Year 1 Financial Documentation (one of the following, depending on budget size)
  - Option 1
    - Certified independent audit
  - Option 2
    - Form 990, and
    - Board approved budget
  - Option 3
    - Board approved budget
- Year 2 Financial Documentation (one of the following, depending on budget size)
  - Option 1
    - Certified independent audit
  - Option 2
    - Form 990, and
    - Board approved budget
  - Option 3
    - Board approved budget

*Application continues on next page*

## **Submission Instructions**

The Cultural Trust only accepts qualification applications submitted by mail. Faxes, e-mails, and other digital formats are *not* acceptable submissions. The outer envelope of the submission should be clearly labeled, "Qualification Application."

If sending by the United States Postal Service, please mail to:

The New Jersey Cultural Trust  
P.O. Box 305  
Trenton, NJ 08625

If sending by UPS, FedEx, or hand-delivering, send to:

The New Jersey Cultural Trust  
33 West State Street, 4<sup>th</sup> Floor  
Trenton, NJ 08625