

**NORTH CAROLINA DEPARTMENT OF THE SECRETARY OF STATE  
CHARITABLE SOLICITATION LICENSING DIVISION  
EDUCATION EXEMPTION QUESTIONNAIRE  
N.C.G.S. 131 F 3(4)**

Organization Name\_

Date Completed\_

Contact Person at Organization\_

Job Title\_

Phone Number\_

Email Address\_

Mailing Address\_

City\_

State\_

Zip Code\_

**Directions: Beginning with Section 1 below, please CLEARLY mark “YES” or “NO” in response to each question.**

**SECTION 1: EDUCATIONAL INSTITUTIONS AS DEFINED BY STATUTE**

Is this organization “an educational institution, the curriculum of which, in whole or in part, is registered, approved, or accredited by the Southern Association of Colleges and Schools, or accredited by an equivalent regional accrediting body?”

YES\_                      NO\_

**If you checked “YES”, please provide the name and location of the organization’s regional accrediting body or copy of the accreditation document.**

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**SECTION 2: INSTRUCTIONAL UNITS ASSOCIATED WITH “EDUCATIONAL INSTITUTIONS” AS DEFINED BY RULE**

Is this organization an instructional unit i.e. “a department or school or educational institution”?

YES\_                      NO\_

Have trustees of an educational institution as defined above granted written authorization for solicitation by this instructional unit?

YES\_                      NO\_

Do the trustees of an educational institution as defined above have final authority over the financial affairs of this instructional unit?

YES\_                      NO\_

Do the trustees of an educational institution as defined above have final authority over the disbursement of the contributions solicited by this instructional unit?

YES\_                      NO\_

Have the trustees of an educational institution as defined above authorized the incorporation of receipts and disbursements of the contributions to the instructional unit as part of the institution’s financial statement?

YES\_                      NO\_

If this organization is an “instructional unit” i.e. department or school or educational institution, do the trustees of an educational institution as defined above grant academic credit for instructional programs of this instructional unit?

YES\_                      NO\_

**IF YOU CHECKED “YES” IN RESPONSE TO ANY QUESTIONS IN THIS SECTION, YOU MUST PROVIDE WRITTEN DOCUMENTATION SUPPORTING THE RESPONSE(S).**

**SECTION 3: FOUNDATIONS ASSOCIATED WITH “EDUCATIONAL INSTITUTIONS” AS DEFINED BY RULE**

Is this organization a foundation that meets the following definition: “an incorporated body which holds status with the IRS as a foundation and is authorized to receive financial support from, and render financial support to, other persons for charitable purposes? “

YES\_ NO\_

Have trustees of an educational institution granted written authorization for solicitation by this foundation?

YES\_ NO\_

Do the trustees of an educational institution have final authority over the financial affairs of this foundation?

YES\_ NO\_

Do the trustees of an educational institution have final authority over disbursement of the contributions solicited by this foundation?

YES\_ NO\_

Have the trustees of an educational institution authorized the incorporation of receipts and disbursements of the contributions as part of the institution’s financial statement?

YES\_ NO\_

**IF YOU CHECKED “YES” IN RESPONSE TO ANY QUESTIONS IN THIS SECTION, YOU MUST PROVIDE WRITTEN DOCUMENTATION SUPPORTING THESE RESPONSE(S) INCLUDING THE “EDUCATIONAL INSTITUTION” WITH WHICH THE ORGANIZATION IS AFFILIATED.**

**SECTION 4: NON-PUBLIC SCHOOLS AS DEFINED BY STATUTE**

Is this organization an “educational institution in compliance with North Carolina General Statutes Chapter 115C, Article 39?” This statutory section applies to non-public schools below college level such as private church/religious schools, home schools, etc. YES\_ NO\_

**SECTION 5: EDUCATIONAL MEMBERSHIP ORGANIZATION**

Is this an organization with a membership that is composed solely of 20 or more educational institutions that meet the criteria set forth in N. C. Gen. Stat. § 131F-3(4)? YES\_ NO\_

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**YOU MUST PROVIDE SUFFICIENT DOCUMENTATION SUPPORTING AN EXEMPTION.**

**WRITTEN DOCUMENTATION SUPPORTING EXEMPTION REQUESTS MAY INCLUDE ARTICLES OF INCORPORATION, BYLAWS, RESOLUTIONS, LEGAL MEMORANDUMS, FINANCIAL RECORDS OR STATEMENTS, TAX FILINGS, STATEMENT OF AUTHORITY OF BOARDS OF DIRECTORS, PROOF OF ACCREDITATION, ETC.**

**THIS QUESTIONNAIRE WILL BE PROCESSED BY THE CHARITABLE SOLICITATION LICENSING DIVISION WITHIN 10 DAYS OF RECEIPT. THE ORGANIZATION WILL RECEIVE A LETTER FROM THE DEPARTMENT INDICATING WHETHER THEY QUALIFY FOR THE EDUCATION EXEMPTION OR MUST OBTAIN A SEPARATE EXEMPTION OR FILE FOR A CHARITABLE SOLICITATION LICENSE TO CONTINUE SOLICITING IN NORTH CAROLINA IN COMPLIANCE WITH STATE LAW.**

**PLEASE VISIT THE DEPARTMENT OF THE SECRETARY OF STATE CHARITABLE SOLICITATION LICENSING WEBSITE AT [https://www.sosnc.gov/forms/by\\_title/Charities\\_Charities\\_Sponsors](https://www.sosnc.gov/forms/by_title/Charities_Charities_Sponsors) TO OBTAIN ADDITIONAL INFORMATION INCLUDING APPLICABLE LAWS AND ADMINISTRATIVE RULES.**

**IF YOU HAVE ANY QUESTIONS REGARDING COMPLETION OF THIS QUESTIONNAIRE, PLEASE CALL THE CHARITABLE SOLICITATION LICENSING DIVISION AT (919) 807-5400. MAIL RESPONSES TO: N. C. DEPT OF THE SECRETARY OF STATE, CHARITABLE SOLICITATION LICENSING DIVISION, PO BOX 29622, RALEIGH, NC 27626-0622.**