



Non-Profit Training FY2023

December 2021



St. Mary's County Finance Office

- Website: www.stmarysmd.com/finance/non-profit
- Email: nonprofithelp@stmarysmd.com
- Deadline for submission is January 14, 2022
- Budget Contacts:
- Sonyia Staats/Budget Analyst
- Shelly Bean/Budget Analyst
- Angela Stirling/Budget Analyst
- Jody Quasney/Deputy Director Finance



Application Requirements

- Each Application must include the following forms:
 - ✓ Contact Information Form
 - ✓ Revenue & Expenditures
 - ✓ Summary of Changes
 - ✓ Project Budget Summary
 - ✓ Selected Statistics
- Additional requirements
 - ✓ Attend a nonprofit institute class
 - ✓ Organization in good standing status with the State
- Additional required documents
 - ✓ Executive Summary
 - ✓ IRS Form 990
 - ✓ Audited Financial Statements, if applicable.



Getting into the Website

- Enter www.stmarysmd.com/finance/non-profit
- Notice of Funding Availability for St. Mary's Non-Profit Application Funding Utility will appear.
- Select Login
- Select login for existing users or select 'New User Register for Account' for first time users
 - This will bring you to the Non-Profit Applicant Dashboard



St. Mary's Non-Profit Applicant Funding Utility Dashboard

Welcome Page

- Executive Officer : Select Register Organization
- Fill out form Organizational Contact Information in its entirety
 1. Executive Official's email – Executive Contact
 2. Budget Point-of-Contact Name: Who we should contact for application questions.
 3. If signed audit or Form 990 have not been submitted with the application, please let us know why and when you expect to submit so that your application can move forward.
 4. Select Save – this will take you back to the dashboard



Non-Profit Institute Classes Attended

- Future year eligibility is contingent upon a member of the organization attending at least one Non-Profit Institute training class during each year. The College of Southern MD holds many training classes including nonprofit leadership, management, strategic planning, fundraising and marketing. The 12th Annual Nonprofit Institute Conference is set for May 5, 2022 and will also count as a non-profit training class as a certificate will be provided by CSM. Additional Information on the conference, class topics, dates, etc. can be found at <https://www.csmd.edu/programs-courses/non-credit/workforce-training/nonprofit-institute/index.html>
- Please enter all Non-Profit Institute Training classes attended during 2021 or if you have signed up to take a class in 2022 be sure to include the date, the class title, and the name of the attendee. **We will only accept classes that can validate attendance with a certificate.**
- Upload the certificate obtained for completed Non-Profit Institute training classes attended at CSM. If you need another copy of your certificate, please contact Michelle Sullivan, Coordinator, Nonprofit Institute at nonprofit@csmd.edu



Application

- Use the drop-down box to select the category of the application. Then click begin. Category descriptions are on the main menu screen; if you need to review you will need to logout to come back to the main menu. The categories are as follows:
- Behavioral Health
- Community Events
- Community Services
- Conservation of Natural Resources
- Cultural Activities
- Disability Services
- Economic Development
- Historical and Heritage Interpretations
- Homeless prevention
- Post/Secondary/Primary Education



Revenue & Expenditures

- Select **Add** under Revenue & Expenditures
- Complete all fields that apply for each year
- Each year your Budget and Requested Revenue should equal Expenses – if you complete this correctly you will see a green check mark at the bottom of the page.
- Once completed select Save
- This takes you back to the Dashboard where you will see Edit under Revenue & Expenditures instead of add. This means that there is information saved that can be edited at anytime prior to January 14, 2022 deadline.



Summary of Changes

- Select **Edit** under Summary of Changes
- This has partially been completed with the Revenue & Expenditure figures from the prior page.
- Please complete FY2021 & FY2022 with number of full-time staff as well as requested increase – full-time staff figures
- Select Save



Project Budget Summary

- Select **Add** under Project Budget Summary
- County Funds: Enter a brief description of what expenses the county funds will/are being used for.
- Enter Actual County Funds for FY2020
- Enter Estimated County Funds for FY2021
- Enter Projected County Funds for FY2022 (requested)
- Description of Benefits: Describe how these funds benefit County Citizens
- Click Save
- Click - Return to your Dashboard



Selected Statistics

- Select **Add** under Selected Statistics
 - Complete Number of Clients Served
 - Number of Clients Served in St. Mary's County
 - *Percent of total clients Served from St. Mary's County is automatically calculated for you*
 - Current number of paid employees (FTE – Full-Time Equivalent)
 - Number of Volunteer hours

For each: FY2021 Actual, Estimated FY2022, and Projected FY2023 Click Save



Required documents

-Executive Summary – a one-page narrative that conveys your programs intent to address the category objectives in the anticipated funding year. How COVID has affected your organization and any alternate solutions to utilize the funds during the pandemic while meeting the category objectives. How your program will accomplish the goals through measurable results.

-Audited Financial Statement – most recent (if required)

-IRS Form 990 – Return of Organization Exempt from Income Tax - most recent completed and filed with the Internal Revenue Service

How to upload the required documents



- Click on the add icon
- Description – name the file so that is recognized by the review panel
- File – Browse and select the document you want to attach
- Document Type – select the appropriate attached document type from drop down list
- Click Save – You will then see the document listed under current documents uploaded
- Enter all required documents one at a time until all documents are listed under current documents uploaded.
- Then select Back to your Dashboard



Grant Application Submission Checklist

- Summary of Changes form
- Revenues vs. Expenditures - All revenues MUST equal expenditure
- Project Budget Summary form
- Selected Statistics form
- IRS Form 990 – most recent filed with the IRS
- Executive Summary
- Audited Financial Statement – if required by the organization
- Non-Profit Institute: Classes and attendee name must be listed and certificate of attendance uploaded
- In Good Standing status with the State - <https://egov.maryland.gov/BusinessExpress/EntitySearch>

IF all the above is complete – you may submit!

IMPORTANT: Ensure that your application has been submitted. The submission Status, noted in RED, along with any missing information will display.

- If Application is not submitted:
 - Select back arrow in top left corner
 - Complete missing information and/or upload missing documents
 - Select Submit once completed

Once you have made the corrections and submitted successfully, you will receive the status of “Application submitted successfully”

- You will also receive a confirmation email of a successfully submitted application. After receipt of this notice, your application is still available for editing and viewing until the January 14, 2022 deadline.
- You may sign in and out of the application as many times as necessary and only one application will be present per category.

CONGRATULATIONS YOU HAVE SUCCESSFULLY SUBMITTED YOUR APPLICATION

YEAH!



Evaluation Criteria

- Organization – 25 points
 - Does the proposal demonstrate a strong organizational structure?
 - Is the request to provide required matching funds for a state or federal grant?
 - Does the organization demonstrate collaboration with other entities?
 - What is the experience of the organization? Year in operation?
 - Does the organization have other funding sources in their budget submission?
- Performance Measures – 35 points
 - Are there identified objectives in the proposal?
 - Are there measurable goals in the proposal?
 - Are the anticipated results compatible with the NOFA?
 - How many clients are served? / What is the % of SMC persons served?
 - What were the number of volunteer hours reported?
- Qualitative analysis – 40 points
 - Does the applicant provide a unique service to St. Mary's County?
 - Does the proposal meet Commissioners goal attainment?
 - Does the proposal align with identified priority categories?
 - Does the identified target population match the NOFA?
 - What is the program implication of receipt of County Funds?

Any questions?

