



# Non-Profit Training FY2024

December 2022



## St. Mary's County Finance Office

- Website: [www.stmarysmd.com/finance/non-profit](http://www.stmarysmd.com/finance/non-profit)
- Email: nonprofithelp@stmaryscountymd.gov  
**(Email address has been changed, please update your records)**
- Deadline for submission is January 13, 2023
- Budget Contacts:
  - Angela Stirling/Budget Analyst
  - Shelly Bean/Budget Analyst
  - Sonyia Staats/Budget Analyst
  - Joyce Sapp/ Deputy Director



# 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 and provide certificate as proof of attendance
  - ✓ Organization must be in a 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](http://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**

- Complete or update 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



## Nonprofit 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 13<sup>th</sup> Annual Nonprofit Institute Conference is set for April 20, 2023 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 2022 or if you have signed up to take a class in 2023, please enter the date, the class title, attendee name, and provide proof of registration. **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. Please save a copy of your certificates as waiting for an additional copy could delay your application submission. If you need another copy of your certificate, please contact Nonprofit Institute at [nonprofit@csmd.edu](mailto:nonprofit@csmd.edu) as soon as possible.



# 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 13, 2023 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 FY2022 & FY2023 with number of full-time staff as well as requested increase – full-time staff figures
- Are County Funds required as matching Funds? Yes or No
- 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 FY2022
- Enter Estimated County Funds for FY2023
- Enter Projected County Funds for FY2024 (requested)
- Description of Benefits: Describe how these funds benefit County Citizens
- Other Funding Sources: List the name of other funding sources
- Enter Actual Other Funding from each source for FY2022
- Enter Estimated Other Funding from each source for FY2023
- Enter Projected Other Funding from each source for FY2024
- Description of funds: Describe how these funds are managed
- 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 specifically for St. Mary's County Programs/Projects only

For each: FY2022 Actual, Estimated FY2023, and Projected FY2024

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. The Executive Summary ***must*** include information listed above as well as the bulletized list on pages 13,14, and 15.

-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



## Executive Summary

### Organizational Structure – should include:

- Organizational Chart (*1 page*)
- Description of background and experience of lead staff/volunteer
- Description of strength of organization's structure  
(*no more than ¾ page*)
- Names of entities your organization collaborates with brief description  
(*no more than ½ page*)
- number of years of experience with written description  
(*no more than ½ page*)
- Other funding sources with written description how funds are managed  
(*no more than ½ page*)



## Executive Summary

Performance Measures – should include:

- List goals
- List objectives, explain how each are specific and measurable (*no more than one page*)
- Describe goals, explain how they match NOFA, how they are specific and measurable, and timeframe to obtain (*no more than one page*)



## **Executive Summary**

Qualitative Analysis – should include:

- Is your service unique to St. Mary's County? Do other agencies provide a similar service? (*no more than ½ page*)
- Objectives attained, provide statement that describes objectives (*no more than 1 page*)
- Explain how your proposal aligns with the selected funding category (*no more than ½ page*)
- Describe the target population your organization represents and how it matches NOFA
- Explain the impact of receipt of County Funds

---

## 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 expenditures
- 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
- Nonprofit 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 13, 2023 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

- Organization Chart included (1 page)? *(1 – 5 pts)*
- County Funds required as matching funds, yes, or no? *(1 – 5 pts)*
- Collaboration with other entities with well written description (no more than ½ page)? *(1 – 5 pts)*
- Experience (number of years with well written description (no more than ½ page)? *(1 – 5 pts)*
- Other funding sources listed and describe how funds are managed (no more than ½ page)? *(1 – 5 pts)*

### Performance Measures – 35 points

- List Goals? *(1 – 7 pts)*
- List Objectives with well written description of how they are measured and timeframe to attain? *(1 – 7 pts)*
- Describe goals and how they match the NOFA, how they are specific, measurable, and timeframe to attain (no more than 1 page)? *(1 – 7 pts)*
- How many clients are served? / What is the % of St. Mary's County persons served? *(1 – 7 pts)*
- If volunteers are utilized, how many hours for St. Mary's County programs only? *(1 – 7 pts)*

### Qualitative analysis – 40 points

- Unique service to St. Mary's County? / Do other agencies provide a similar service (no more than ½ page)? *(1 – 8 pts)*
- Objectives attained? / Provide statement describing objectives (no more than 1 page). *(1 – 8 pts)*
- How does the proposal align with the funding category (no more than ½ page)? *(1 – 8 pts)*
- Does the identified target population match the NOFA? *(1 – 8 pts)*
- What is the program's impact of receipt of County Funds? *(1 – 8 pts)*

---

Any questions?

