PENSACOLA BAY AREA
IMPACT 100
Arts & Culture · Education · Environment · Family · Health & Wellness
Welcome
to the
2022 Nonprofit
Workshop

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Arts & Culture · Education · Environment · Family · Health & Wellness

Nonprofit Workshop Agenda

8:30 - 9:00	Sign-In & Breakfast
9:00 - 9:15	Welcome & Introductions
9:15 - 10:00	Guest Speaker, Emily Lalas
10:00 - 10:30	Grants Process Overview
10:30 - 10:45	Construction Review
10:45 - 11:00	BREAK

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Nonprofit Workshop Agenda

11:00 - 11:45 Guest Speaker, Dr. Irv Williams

11:45 - 12:00 Serve Lunch

12:00 - 12:45 Panel Discussion

12:45 - 1:00 Transition to Social/Tabletop Discussions

1:00 - 2:00 Social/Tabletop Discussions

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Jodi Bell

Regional Director of Sales

Thank you for your sponsorship!

pensacola news journal

PART OF THE USA TODAY NETWORK

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Thank you!

REGENERATIVE MEDICINE
AND PAIN MANAGEMENT PHYSICIANS

COFFEE GUY CAFE

Café

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Mission Statement

- To know and serve the community;
- To collectively fund significant grants to charitable initiatives;
- To set an example of effective philanthropy.

1142
MEMBERS
11 GRANTS
$103,820
AWARD

SALTMARSH, CLEAVELAND & GUND

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April 19, 2022

IMPACT 100 Nonprofit Workshop: Telling Your Story Through Financial Reporting

By Emily Lalas

Saltmarsh, Cleaveland & Gund

ABOUT THE FIRM

Saltmarsh is one of the largest locally-owned CPA and business advisory firms in the Southeast, serving clients throughout the U.S. and worldwide from offices across Florida and in Nashville, Tennessee.

SIZE OF FIRM

150+ PROFESSIONALS

AFFILIATIONS

SALTMARSH FINANCIAL ADVISORS, LLC

Saltmarsh Financial Advisors, LLC

AN AFFILIATE OF SALTMARSH, CLEAVELAND & GUND

THE BDO ALLIANCE USA

AN INDEPENDENT MEMBER OF BDO ALLIANCE USA

OFFICE LOCATIONS

5

FLORIDA
Ft. Walton Beach
Orlando
Pensacola
Tampa

TENNESSEE
Nashville

CELEBRATING 75 YEARS

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SERVICES OFFERED

Audit & Assurance | Business Valuation | Financial Institution Consulting | Financial Planning | Flexible Spending Plan Administration | Healthcare Consulting | Human Resources Consulting | Information Technology Consulting | Investment Management | Litigation & Dispute Advisory | Managed IT Services | Outsourced Accounting Solutions | Research & Development Tax Credits | Retirement Plan Administration | Tax Compliance & Consulting

OUR CLIENTS

Community Banks | Construction & Real Estate Development | Credit Unions | Governments, Municipalities, Special Districts & Pension Plans | High Net Worth Individuals | Hospitality | Manufacturing & Distribution | Non-Profit Organizations | Post-Acute Healthcare | Professional Employer Organizations | Technology & Emerging Growth

INSIDE PUBLIC ACCOUNTING TOP 200 FIRMS 2021

2021 BEST OF THE BAY FINALIST

INWEEKLY'S BEST OF THE COAST 2021

2021 PEOPLE'S CHOICE BEST OF THE BEST

We AAM to Serve

saltmarshcpa.com | (800) 477-7458

THE IMPORTANCE OF STORYTELLING

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Qualities of Good Financial Statements

- Accurate, current data
- Professional presentation
- Transparency – clear and informative descriptions and note disclosures
- Program descriptions and terminology that is consistent with other information published on your organization's website, marketing materials, grant applications, 990, etc.

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Nonprofit Financial Reporting

- GAAP – Generally Accepted Accounting Principals, i.e. the rules for accurate financial statement reporting in the U.S.A.
- External Reporting (available to donors and the public) –
  - Annual Audit (if required)
  - Annual Informational Return, 990
  - Other required external reports for grantors
- Internal Reporting (reports for management use and board oversight only) –
  - Monthly budget-to-actual reports
  - Monthly Internally-generated Statements of Financial Position and Activities

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Key Financial Reporting Terms

- "With Donor Restrictions" – Assets with donor restrictions mean that those assets are only able to be used for purposes or at certain times specified by the donor (or grantor) at the time of donation
- "Without Donor Restrictions" – Assets without donor restrictions are available for the organization to use as management and board see fit. These resources are still required to be used in a manner that furthers your stated exempt purpose.

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Key Financial Reporting Terms

- Overhead – the cost incurred to operate an Organization which cannot be directly tied to a program
- Gifts In-kind – contributions of noncash goods or professional services that are provided below standard market rate
  - NOTE: Professional services meeting GAAP criteria for in-kind reporting must be services that would otherwise have to be purchased, i.e. legal council, accounting services, etc. The donation of board members' time attending board meetings does not qualify as an in-kind contribution.

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Basic Financial Statements

- Statement of Financial Position – also known as the balance sheet for nonprofits
  - Useful in evaluating if the organization has adequate resources to meet its current and long-term obligations
  - Useful in evaluating liquidity (how much of your assets are available for immediate and unrestricted use)
- Statement of Activities – also known as the income statement or profit and loss statement for nonprofits
  - Shows the type and amount of funding the organization receives in the given fiscal year
  - Useful in evaluating whether sources of funding are sustainable, if there are any risky concentrations of funding, if we are spending more or less than the revenue you are generating

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XYZ ORGANIZATION
STATEMENTS OF FINANCIAL POSITION
DECEMBER 31, 2020 AND 2019

ASSETS

	2020	2019
Current Assets:		
Cash and cash equivalents	$ 1,500,000	$ 725,000
Grant and other receivables	155,000	367,500
Prepaid expenses and other current assets	50,000	25,000
Total current assets	1,705,000	1,117,500
Noncurrent Assets:		
Property and equipment, net	2,500,000	2,500,000
Total Assets	$ 4,205,000	$ 3,617,500

LIABILITIES AND NET ASSETS

Current Liabilities:		
Accounts payable	$ 35,000	$ 45,000
Accrued expenses	70,000	95,000
Deferred revenue	45,000	-
Notes payable	200,000	-
Total current liabilities	350,000	140,000
Net Assets:		
Without donor restrictions	3,750,000	3,470,000
With donor restrictions	105,000	7,500
Total net assets	3,855,000	3,477,500
Total Liabilities and Net Assets	$ 4,205,000	$ 3,617,500

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XYZ CORPORATION
STATEMENT OF ACTIVITIES
YEAR ENDED DECEMBER 31, 2020

	Without Donor Restrictions	With Donor Restrictions	1900 Total
Operating Activities:			
Support and Revenue:			
Contributions, including in-kind donations of $50,000	$ 450,000	$ 100,000	$ 550,000
Grants	1,600,000	-	1,600,000
Rent income	65,000	-	65,000
Charges for services	410,000	-	410,000
Total support and revenue	2,525,000	100,000	2,625,000
Expenses:			
Program services -			
Program 1, including in-kind donations of $15,000	1,600,000	-	1,600,000
Program 2	270,000	-	270,000
Program 3, including in-kind donations of $500	190,000	-	190,000
Program 4	90,000	-	90,000
Supporting services -			
General and administrative, including in-kind donations of $30,000	100,000	-	100,000
Fundraising, including in-kind donations of $1,500	150,000	-	150,000
Total expenses	2,400,000	-	2,400,000
Change in net assets from operating activities	125,000	100,000	225,000
Nonoperating Activities:			
Interest income	2,500	-	2,500
Change in Net Assets	127,500	100,000	227,500
Net Assets at Beginning of Year	3,617,735	7,567	3,625,302
Net Assets at End of Year	$ 3,745,235	$ 107,567	$ 3,852,802

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Basic Financial Statements

- Statement of Functional Expenses
  - Useful in evaluating how the organization is spending its resources and the percentage of spending that is going towards programs as opposed to management and general
  - Donors/contributors may look for specific elements within the Statement of Functional Expenses when deciding whether and how much to give
    - Program funding – proportionate with admin funding
    - Administrative costs – high enough to attract talent & investors, run a smooth business
    - Fundraising – low costs with high returns

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Basic Financial Statements

- Statement of Functional Expenses
  - Functional expense classification – grouping expenses according to their purposes (program vs supporting services)
  - Natural expenses classification – based on type of expense (employee benefits, rent, supplies)
  - Statement of functional expenses shows natural classification broken out by functional expense classification
  - Allocation methods
    - Direct Allocation – assigning expenses to each functional category based on direct usage
    - Indirect Allocation – assigning expenses based on objective basis determined by financial & non-financial information

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XYZ CORPORATION
STATEMENT OF FUNCTIONAL EXPENSES
YEAR ENDED DECEMBER 31, 2020

	2020						
	Program Services				Supporting Services		
	Program 1	Program 2	Program 3	Program 4	General and Administrative	Fundraising	Total
Salaries and related costs	$ 1,350,000	$ -	$ 165,000	$ 25,000	$ 39,000	$ 115,000	$ 1,694,000
Utilities	2,500	45,000	-	-	-	-	47,500
Repairs and maintenance	500	20,000	-	-	-	-	20,500
Marketing	-	-	-	-	-	500	500
Insurance	9,500	30,000	-	-	-	-	39,500
Depreciation	-	100,000	-	-	-	-	100,000
Bad debt expense	500	-	-	-	1,000	-	1,500
In-kind expense	7,000	-	400	-	30,000	1,500	38,900
Supplies	15,000	8,000	100	2,500	1,500	6,000	33,100
Cleaning	-	20,000	-	-	-	-	20,000
Rent	40,000	800	500	1,000	500	2,000	44,800
Pass-through grants	-	80,000	-	-	-	-	80,000
Contracted services	95,000	1,200	-	1,500	8,000	-	105,700
Other	30,000	15,000	24,000	60,000	20,000	25,000	174,000
	1,550,000	320,000	190,000	90,000	100,000	150,000	2,400,000
Facility expense allocation	50,000	(50,000)	-	-	-	-	-
Total expenses	$ 1,600,000	$ 270,000	$ 190,000	$ 90,000	$ 100,000	$ 150,000	$ 2,400,000

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Basic Financial Statements

- Statement of Cash Flows
  - Useful in identifying the sources and uses of cash
  - Even if revenues exceed expenses, entities could have issues meeting their obligations and providing services to the community if they do not manage cash flow well
    - Receivables & pledge collection
      - Donors look at revenue and cash flow to see collection on grants, receivables, & pledges
      - Timing differences may show favorable revenues with unfavorable cash flows

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What is the purpose of a 990?

- The 990 is an informational return that the organization is required to file with the IRS annually.
- All 990s are **open to public inspection** (i.e. anyone with internet access can search the IRS database and obtain a copy of this).
- Large donors will often analyze the information reported in the 990 before committing to making donations.
- When prepared correctly, your 990 is a great opportunity to communicate the services an organization provides and its program accomplishments to existing and potential donors.

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Key 990 "Need to Know" Items

- Consistency is key!
- The return includes basic financial information (Statements of Financial Position, Activities and Functional Expenses) as well as supplemental schedules that provide more detail about the organization and its accomplishments
- Basic Key Metrics, usually important to donors –
  - Overall fiscal responsibility – How is an organization using its assets to provide services, donations being used wisely, are liabilities reasonable and are there sufficient resources to meet obligations
  - Statement of Functional Expenses – The general rule of thumb is that program expenses should account for most overall expenses. Overhead should stay as low as possible. This shows that funding is being used to provide as many services to the community as possible.

Key 990 "Need to Know" Items

- The 990 discloses information about the organization's governance – including a listing of all Board members
- Organizations are required to disclose salaries or other payments made to key employees and board members
- Key contributors must be disclosed in the 990
- Related party transactions must be disclosed in the 990
- Donors can use the narrative information within the 990 schedules to determine if the organizational activity is truly aligned with the mission that the awarding agency is wanting their funding to accomplish.

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Form 990: Schedule A

- Details information regarding the organization's public charity status and public support received
- List supported organizations, if any
- Details public support such as gifts, grants, contributions, etc.
- Calculates the public support % test – a test that can determine whether your organization qualifies as a charitable organization or foundation

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Story-telling Opportunities

- Even if your organization is smaller and files a 990-EZ, you can still file supplemental schedules with it and utilize those schedules to tell your story
- Consider the following data when preparing the narrative schedules –
  - **Who did you serve?** This should include accurate, descriptive phrases such as "women and children in Northwest Florida", "teens ages 13 - 18", "disabled dogs", etc.
  - **How many people did you serve?** Including both quantitative data to supplement the qualitative descriptions helps users see how wide your organization's reach is.
  - **What did you provide?** Whether the nonprofit provided food and coats to the homeless or medical services to trafficking survivors, it is important to communicate what you provided to the people you helped.
  - **How did your services help the people you serve?** For example, did providing coats to the homeless lower hypothermia cases by 10% in your city? Or did providing medical services to trafficking survivors result in 200 survivors being successfully admitted to long-term recovery programs?

Story-telling Opportunities

- Schedule O
  - Can be used however an organization would like to provide more detail about any of the questions or basic financial information presented in the basic form
  - This is a great place to clarify anything that may be abnormal or may raise questions (such as the organization's response to fundraising in light of COVID)
  - Can be used to bring attention to any new services or programs or accomplishments

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Part III **Statement of Program Service Accomplishments**

Check if Schedule O contains a response or note to any line in this Part III . . . . . ☐

1 Briefly describe the organization's mission:

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? . . . . . ☐ Yes ☐ No

If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? . . . . . ☐ Yes ☐ No

If "Yes," describe these changes on Schedule O.

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4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code: _____) (Expenses $ _____ including grants of $ _____) (Revenue $ _____)

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Story-telling Opportunities

- Schedule I – Grants and Other Assistance to Organizations, Governments and Individuals
  - Organizations can use this to highlight the funding that they were able to provide throughout the year
  - Other organizations seeking funding from you can also use this schedule to see the types and amounts of funding that has historically been awarded

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SCHEDULE I (Form 990)

Department of the Treasury
Internal Revenue Service

Grants and Other Assistance to Organizations, Governments, and Individuals in the United States

Complete if the organization answered "Yes" on Form 990, Part IV, line 21 or 22.

► **Attach to Form 990.**

► **Go to *www.irs.gov/Form990* for the latest information.**

OMB No. 1545-0047

2021

Open to Public Inspection

Name of the organization

Employer identification number

Part I General Information on Grants and Assistance

1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? . . . . . ☐ Yes ☐ No

2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments.

Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than $5,000. Part II can be duplicated if additional space is needed.

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section (if applicable)	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of noncash assistance	(h) Purpose of grant or assistance
(1)							
(2)							
(3)							

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Common Audit Deficiencies

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QUESTIONS?

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CONTACT

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Grant Process Overview

- Timeline
- LOI Requirements
- Organization Eligibility
- Project Eligibility

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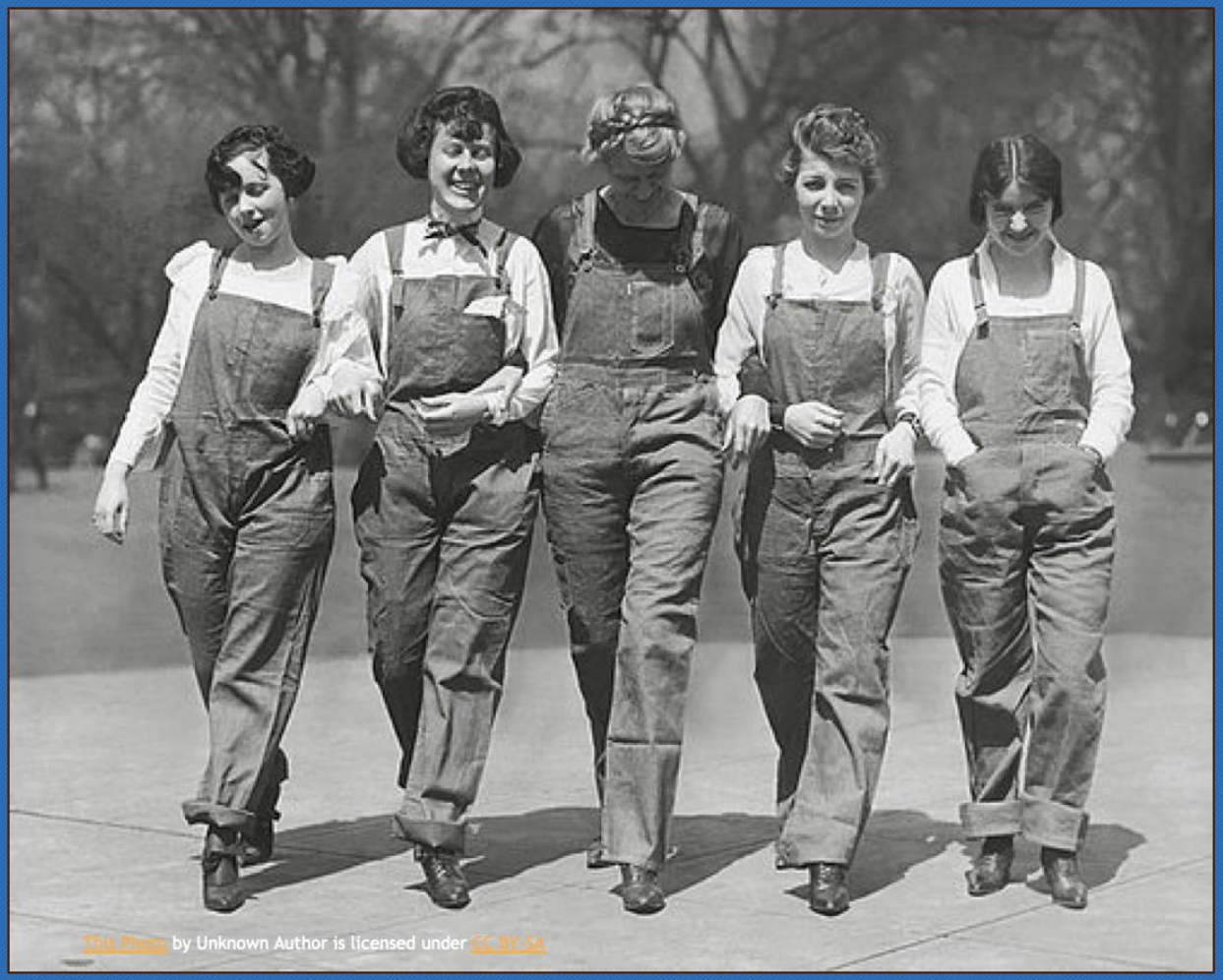
GRANT APPLICATION TIMELINE

LOI
LETTER OF INTENT
LETTER OF INTENT TO APPLY

APRIL 30 – NOON

LOI DEADLINE



MAY

Your IMPACT 100 Grants Committee goes to work verifying eligibility of the LOI

Letter of Intent

100%

- ✓ **Treasury Letter - Verify 501(c)(3) Status**
- ✓ **Annual Report with the Florida Dept of State, Division of Corporations**
- ✓ **Registration with Florida Department of Agriculture & Consumer Services (FDACS)**

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Grant Application 101

(Webinar)

May 17

If you submit an LOI – you will be invited to Grant Application 101. During this webinar we will walk you through the online grant application. We will cover every line of the grant application and give you an opportunity to ask questions regarding it.

Grant Q & A

for those who
are submitting
an Application

Appointment Only

- **June 7**
- Zoom
- Individual Sessions with Grants Committee Board Members

JUNE 15 – NOON

GRANT APPLICATION DEADLINE

PENSACOLA BAY AREA IMPACT 100

Arts & Culture · Education · Environment · Family · Health & Wellness

Project Eligibility

- Serve residents of/expend funds fully in Escambia/Santa Rosa
- New program/expansion of existing program/collaborative effort of multiple NPOs
- Have a total budget for the entire grant amount
- Expend funds within 24 months of October 31
- Be designated by the applying NPO for one of the following Focus Area Committees:

Focus Areas

- ***Arts, Culture & History***

Initiatives that cultivate, develop, enhance and preserve the artistic, cultural and historic character of the Pensacola Bay Area.

- ***Education***

Initiatives that further the educational process or improve access to education for children and/or adults in the Pensacola Bay Area.

- ***Environment & Recreation***

Initiatives that will restore, revitalize or enhance the environment and/or create or improve recreational opportunities of the Pensacola Bay Area.

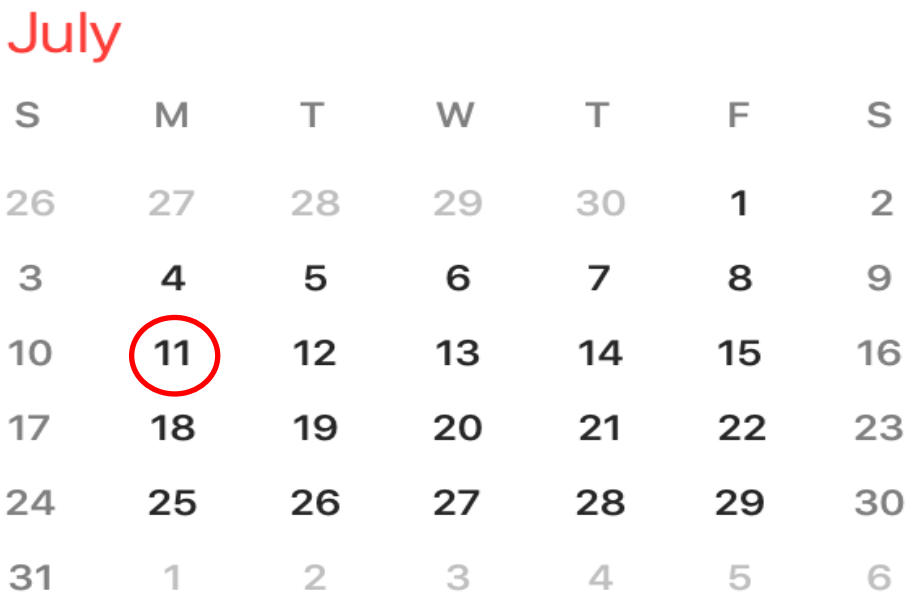
Focus Areas

- ***Family***

Initiatives that strengthen and enhance the lives of children and families living in the Pensacola Bay Area.

- ***Health & Wellness***

Initiatives that improve the mental and/or physical well-being of people living in the Pensacola Bay Area.

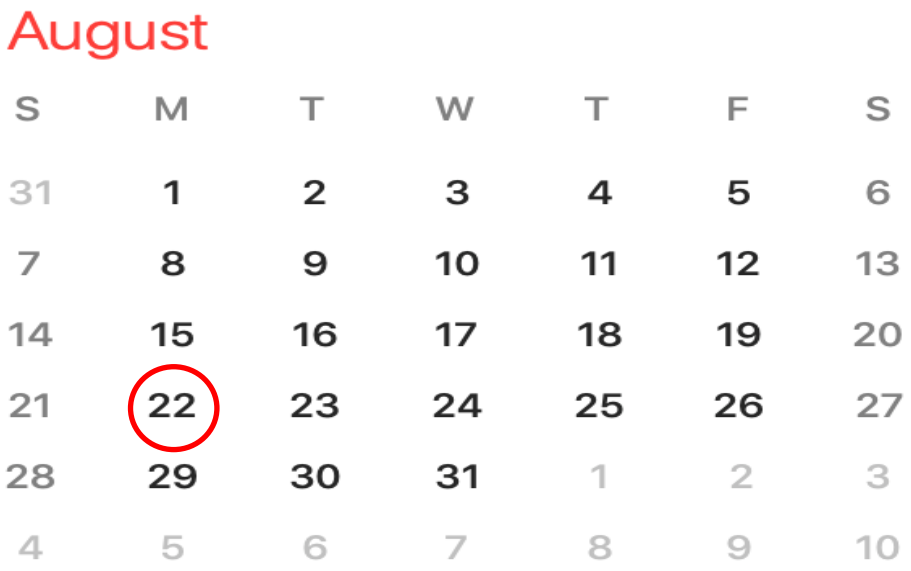


Focus Area Committees consisting of IMPACT 100 members review grant applications.
Site visits are conducted by a small team of committee members.
Applications are evaluated on:

- Strength of the organization,
- Strength of the project,
- Impact of the project on the community and
- Project's sustainability.

Committees select finalists in each of the five Focus Areas.

Focus Area Committees Meet



FINALIST ANNOUNCEMENT

SEPTEMBER 7, 2022

Finalists will be notified by phone.
All other applicants will be notified by email and mail prior to the Finalist Announcement.

MILLION DOLLAR SUNDAY!

ANNUAL MEETING

OCTOBER 16

Summaries of the finalists' projects will be provided to voting members of IMPACT 100 Pensacola Bay Area.

Each Grant Finalist will provide a five-minute presentation for the IMPACT 100 Annual Meeting. IMPACT 100 members will vote by individual ballot.

Projects will be selected by majority vote.

Annual Meeting
Sunday, October 9, 2022

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A liaison will be assigned to walk you through the project process.

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All applicants who have successfully completed the application process will have an opportunity to submit a wish list of items that could benefit their organization. Wish lists will be posted on the IMPACT 100 website for one year, giving donors an opportunity to fund applicants' wishes.

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Financial Requirements

- ✓ **Fiscal Year End**
- ✓ **Most Recent 990**
- ✓ **Last Year's 990**
- ✓ **Profit and Loss Statement from date of last filing to 3/31/2022**
- ✓ **Balance Sheet as of 3/31/2022**
- ✓ **Audited Financial Statements if available**

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Balance Sheet

Other names might be:

- Statement of Assets, Liabilities & Equity
- Statement of Financial Position

Profit and Loss Statements

Other names might be:

- P&L
- Income Statement
- Statement of Income & Expense
- Statement of Revenues & Expenses
- Statement of Activities

CONSTRUCTION REVIEW INFORMATION

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ITEMS THAT YOUR CONSTRUCTION BUDGET MAY INCLUDE

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OTHER TYPICAL PROJECT COSTS

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ESTIMATES/BIDS

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PERMITTING

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IT'S OK TO BE SELFISH: TAKING CARE OF YOU SO YOU CAN TAKE CARE OF OTHERS

PRESENTED BY
IRVIN J. WILLIAMS PHD, MCAP

PENSACOLA BAY AREA IMPACT 100
NONPROFIT WORKSHOP

APRIL 19, 2022

CHALLENGES OF NONPROFIT LEADERSHIP

- Financial sustainability
- Workforce Shortage
- Staff Burnout
- Work/Life Balance
- Environmental changes (COVID Epidemic)
- More need than resources

SELF-CARE IS CRITICAL TO RESPONDING TO THE CHALLENGES

Four Areas of Self to Explore

- Biological
- Psychological
- Social
- Spiritual

BIOLOGICAL

- Proper amount of rest
- Eat a healthy diet
- Regular doctor visits
- Exercise
- Identify and manage stress (massage, yoga, Ti-Chi, back rub))
- Avoid nicotine
- Avoid excessive caffeine/sugar
- Avoid excessive alcohol

PSYCHOLOGICAL

- Identify and manage feelings
- Manage expectations (of self & others)
- Control the negative inputs in your life (social & network media, friends)
- Maintain a sense of purpose and meaning
- Recognize and acknowledge your strengths
- Optimistic perspective
- Ask for help (friend and/or professional)
- "Just say No"

SOCIAL

- Work with a mentor
- Have fun (friends, family, team members)
- Healthy support system
- Able to love and trust others
- Make time for family
- Vacation

SPIRITUAL

- Prayer
- Meditation
- Read Spiritual/inspirational literature
- Fellowship with spiritual people
- Attend Spiritual services
- Practice humility
- Commune with nature

HELPFUL PERSPECTIVE

God grant me the serenity to accept the things I cannot change,

the courage to change the things I can, and the wisdom to know the difference.
Reinhold Niebuhr

"As a man/woman thinketh in his/her heart, so is (s)he" *Prov 23:7*

"Free your mind and your body will follow" *George Clinton 1970*

CONCLUSION

(1) Challenge yourself: Select one thing to do

- Different
- New
- More or
- Less

In the each of the four areas of your life

(2) Complete the Two-minute Self-Care Survey

RESOURCES

- Top 10 causes of stress and how to beat them. www.realbuzz.com/articles September 16, 2012
- Four Ways to Deal with Stress. www.heart.org/Heartorg/getting healthy/stressmanagement/fourwaystodealwithstress. 9/10/12
- Two-Minute Self-Care Survey, Jo Anne Bishop, PhD, MPA, The Office Guide to Executive Coaching. Crossing Bridges & Associates, crossingbridges@Hawaii.it.com

PENSACOLA BAY AREA

IMPACT 100

Arts & Culture · Education · Environment · Family · Health & Wellness

Panel Discussion

Grant Recipients

IMPACT 100 Board Members

Panelists:

Prudence Caskey, Santa Rosa County 4-H 2019 Education (4-H Field Education Facility)

Sylvia Tisdale, Ecomfort 2020 H&W (Food as a Tool)

Cindi Bonnor, Rally Foundation 2021 Family (Rally Foundation for Childhood Cancer Research: Rally Resource Room)

IMPACT100 BOARD MEMBERS: Roz Leahy, Alicia Ahern, Jenn Bear, Lisa Fairbanks, Martha Holden, Diane Schwartz

TABLETOP DISCUSSION

With:
Emily Lalas
Dr. Williams
Financial Representatives
Grants Committee Member
Board Members

PENSACOLA BAY AREA
IMPACT 100
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Thank you for attending!

Remember:
We will help you every step of the way!

Submit your questions to:
grants@impact100pensacola.org