PENSACOLA BAY AREA

IMPACT 100

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

NONPROFIT WORKSHOP

Thursday, April 18, 2024

9:00 a.m. - 2:00 p.m.

Brownsville Community Center

3200 W. De Soto St. Pensacola, FL 32505

Register for free at ***impact100pensacola.org***

Agenda

8:30 - 9:00	Sign-In & Breakfast
9:00 - 9:15	Welcome & Icebreaker
9:15-9:30	IMPACT 100 Pensacola Bay Area Mission
9:30- 10:15	Grants Process Overview
10:15- 10:40	Financial Requirements
10:40-11:00	Construction Resources
11:00- 11:15	BREAK
11:15- 12:00	Guest Speaker Mr. Darrick McGhee
12:00- 12:15	LUNCH
12:15- 1:00	Panel Discussion
1:00 - 2:00	Social/Tabletop Discussions

THANK YOU SPONSORS

FPL

BAGELHEADS
FEED YOUR HEAD

THE LEWIS BEAR COMPANY
L.B.C
1876

Amanda Hindsman

Grants Chair, IMPACT 100 Pensacola Bay Area

Let's Mingle:
"Up for Grabs"

Kristin Longley

President, IMPACT 100 Pensacola Bay Area

Mission Statement

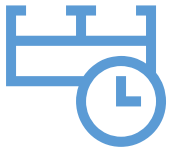
To know and serve the community, to collectively fund significant grants to charitable initiatives, and to set an example of effective philanthropy.

Celebrating
$1,208,000
RAISED FOR our COMMUNITY IN 2024
1,208 MEMBERS
&
12 GRANTS
PENSACOLA BAY AREA
IMPACT 100
Arts & Culture · Education · Environment · Family · Health & Wellness

Carrie Gaut

Grants Co-Chair, IMPACT 100 Pensacola Bay Area

Grant Process Overview



Timeline

LOI Requirements

Organization Eligibility

Project Eligibility

GRANT PROCESS

ROADMAP TO SUCCESS

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GRANT PROCESS

ROADMAP TO SUCCESS

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GRANT PROCESS

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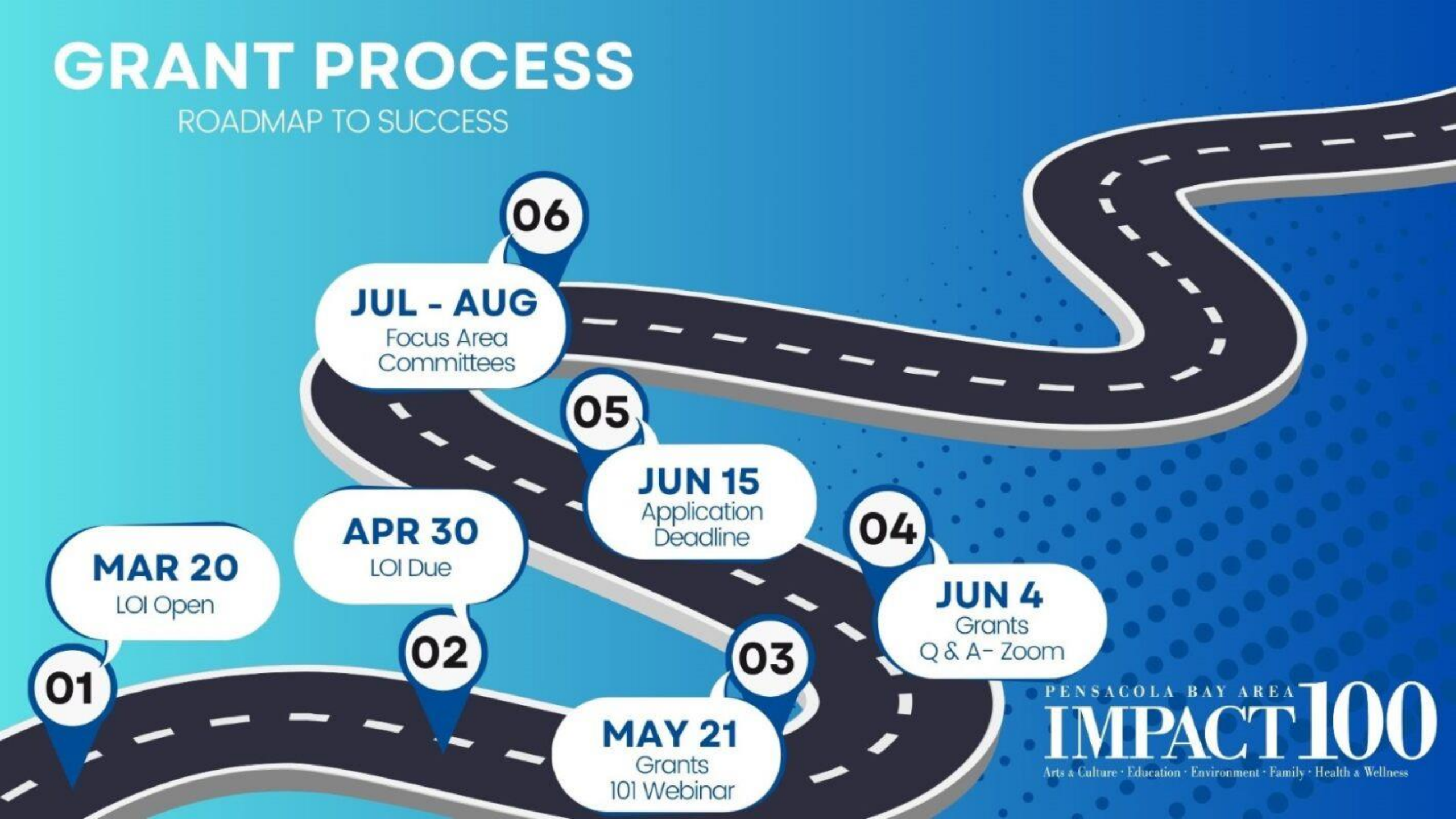

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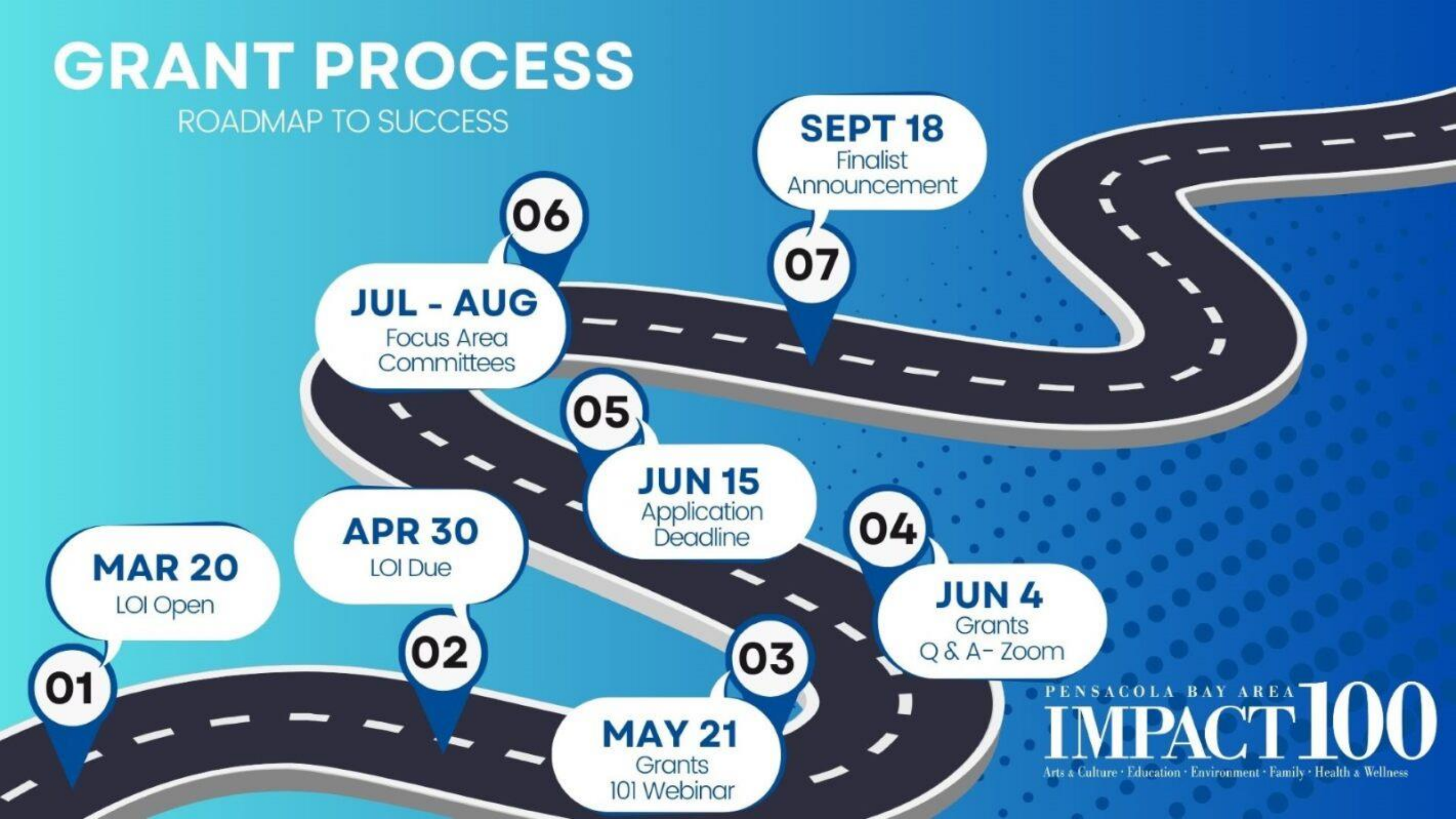
GRANT PROCESS

ROADMAP TO SUCCESS



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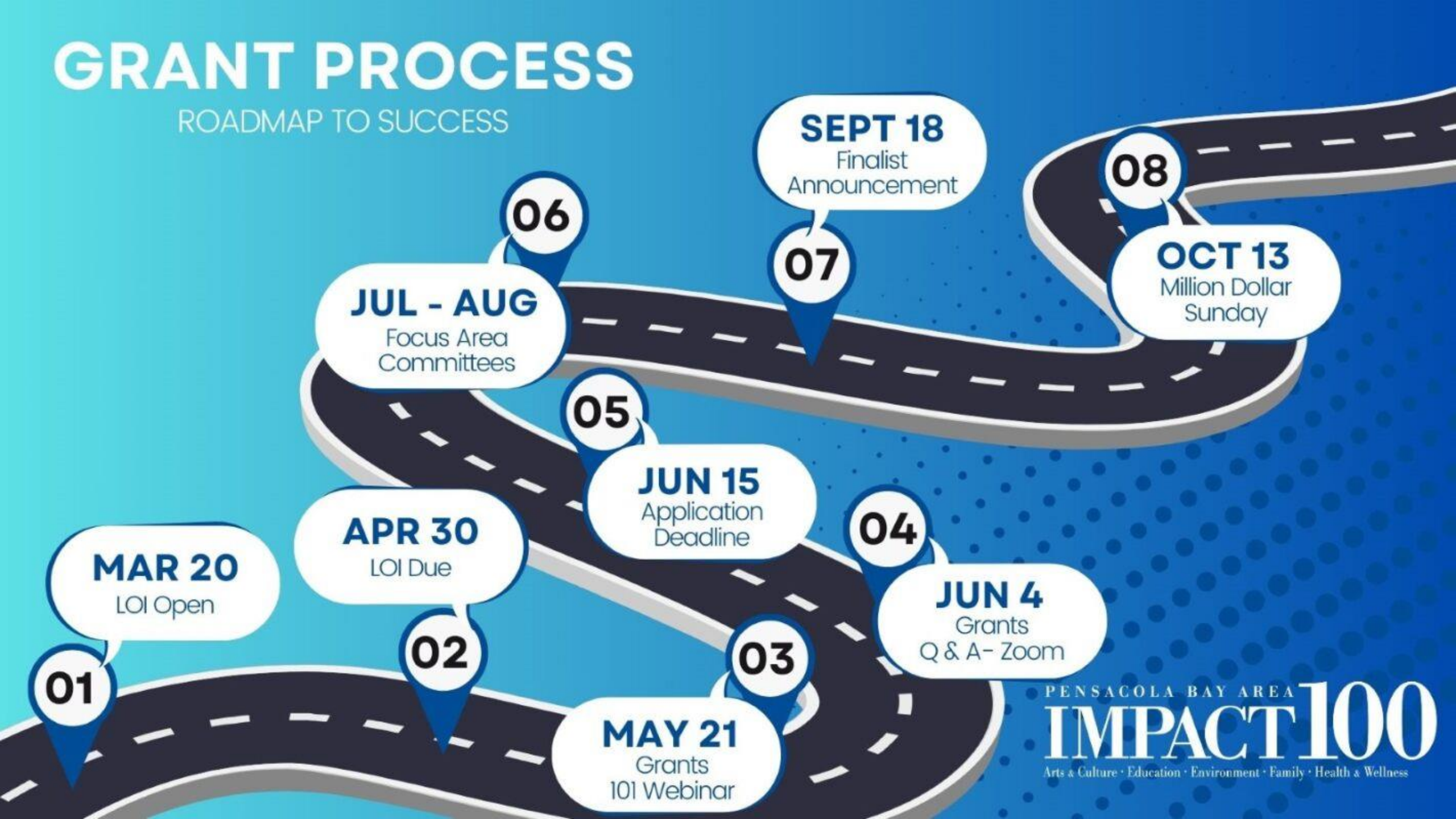

PENSACOLA BAY AREA

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Letter of Intent Requirements

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)

Organization Eligibility

- Defined as a tax-exempt public charity under Section 501(c)(3) of the Internal Revenue Code
- Operating in Escambia and/or Santa Rosa Counties, providing the majority of the services to individuals in these counties, or applying for a collaborative IMPACT 100 grant with such organizations
- Registered with the Florida Department of State, Division of Corporations
- Registered with the Florida Department of Agriculture and Consumer Services, unless the organization is exempt

Project Eligibility

- Serve persons in Escambia and/or Santa Rosa Counties and expend project funds locally whenever possible and practical
- Be a new program, expansion of an existing program, or a new or expanded collaborative effort of multiple nonprofit organizations
- Have a total project budget for the full IMPACT 100 grant amount

Will Not Provide Grants for...

- Debt reduction or operational deficits
- General operating expenses or overhead, such as ongoing salaries for existing staff
- Capital improvements or renovations to property for the grant project unless the organization has a possessive or ownership interest in the property for at least 3 years from the date the grant would be awarded, and the landlord consents to the capital improvements
- Capital improvements or renovations to property that is currently listed for sale or plans to be sold 3 years from the date the grant would be awarded
- Grants to individuals
- Endowment funding
- Interim or bridge funding
- Partisan, legislative, or political activity
- Projects of individual churches, synagogues or other religious institutions will not be funded unless a separate tax-exempt entity that is not under the umbrella of the church, synagogue or other religious institution exists for receiving IMPACT 100 funds
- Faith-based projects or programs which require participation in activities of a particular faith, denomination or religion in order to benefit from the project or program

Five Focus Areas

Arts, Culture & History

Initiatives that develop, enhance, or preserve the arts, music, culture or history 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 restore, revitalize or enhance the environment and/or create or improve recreational opportunities of the Pensacola Bay Area.

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.

Board Member Roles

Board of Directors	
***Board Member 1 Full Name:**	Joe Somebody
*Current or Previous Profession:	Vice President
*County and State of Residence:	FL
*Position on Board:	Member
***Board Member 2 Full Name:**	Somebody Else
*Current or Previous Profession:	Retired Higher Education
*County and State of Residence:	FL
*Position on Board:	Member

Mandy Bills

IMPACT 100 Treasury Committee

Financial Requirements

Fiscal Year End

Financial Statements

Form 990

Financial Requirements

Which Form 990 is filed?

Form 990

Form 990EZ

Form 990N

Extension to file current year 990, if applicable

Form 990 Requirements

Schedule A

- Details public charity status and public support received
- Calculates the Public Support Test
- Details public support such as gifts, grants, contributions, etc.
- Lists supported Organizations, if any

Form 990 Requirements Cont'd

Schedule O

- Used to provide narrative information required for responses to specific questions
- Clarify anything that may be abnormal or may raise questions
- Can be used to bring attention to any new services or programs or accomplishments

Form 990 Requirements Cont'd

Form 990 (2020) Page **2**

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.

Balance Sheet for your Organization

ABC Services
Balance Sheet
March 31, 20XX (current year)

ASSETS	March 31, 20XX
Current Assets	
Checking/Savings	27,500.00
Inventory Assets	1,118.20
Total Current Assets	28,618.20
TOTAL ASSETS	28,618.20
LIABILITIES & EQUITY	
Equity	
Members Equity	24,078.55
Opening Balance Equity	4,539.65
Total Equity	28,618.20
TOTAL LIABILITIES & EQUITY	28,618.20

Balance Sheet

Other names might be:

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

Profit and Loss

Profit and Loss Statements

Other names might be:

- P&L
- Income Statement
- Statement of Income & Expense
- Statement of Revenue & Expense
- Statement of Activities

ABC Services
Statement of Activities
As of March 31, 20XX (current year)

	March 31, 20XX
Revenue	
Contributions	
United Way Services	17,500.00
Capital Campaign	1,197.50
Unrestricted Donations	433.79
Total Contributions	19,131.29
Program Revenue	12,486.75
Grants	5,000.00
Total Revenue	36,618.04
Expense	
Salaries	6,212.55
Bank Service Charges	240.58
Computer and Internet Expenses	277.36
Legal	119.00
Program expenses	4,543.75
Office Supplies	422.63
Professional Fees	375.00
Website Hosting	348.62
Total Expense	12,539.49
Net Income	24,078.55

Financial Requirements

IRS Form 990	Most recent and previous year
Financial Statements	Most recent and previous years Balance Sheet and P&L Current year Balance Sheet and P&L through 3/31/2024 Organizations in operation less than 2 years – provide from date of inception

Audit, review or compilation, if possible. If your organization does not engage a CPA or accountant, please provide internally generated statements

Financial Requirements

- Naming Convention
  - NonprofitName_Balance Sheet 2022
  - NoprofitName_Income Stmt 2022
  - NonprofitName_Form 990 2022
  - NonprofitName_Balance Sheet 2023
  - NonprofitName_Income Stmt 2023
  - NonprofitName_Form 990 2023
  - NonprofitName_Balance Sheet 3/31/2024
  - NonprofitName_Income Smt 3/31/2024

Additional Financial Tips:

- Financial person review Financial Statements
- Narrative for unusual items on the Financial Statements
- Accuracy of Budget
- Cost Estimates
- Financial Reviewers Scorecard available on Website

Martha Holden

President Elect, IMPACT 100 Pensacola Bay Area

Simple Updates, Renovations, Remodeling

When is it considered.... **CONSTRUCTION??**

(About 31% of the time in our Grant apps over the last 4 years)

It's Time for Audience Participation!

Time for a Virtual Field Trip!

- Grab your phone and go to:

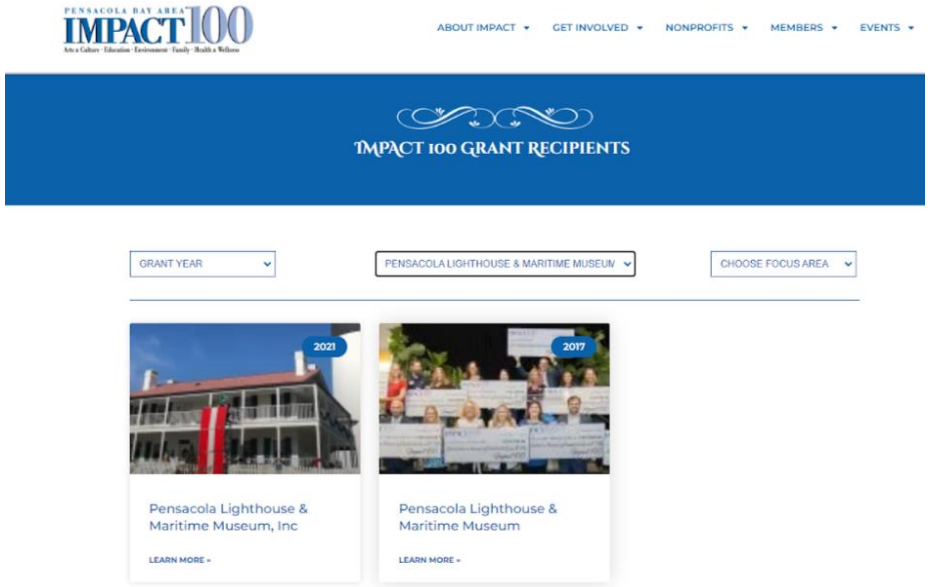
  Impact100pensacola.org

- Now Navigate to:

  NONPROFITS > **All IMPACT 100 Grant Recipients**

Impact100pensacola.org

View all Funded Nonprofits for 20 Years



Select One Organization to View Project(s)

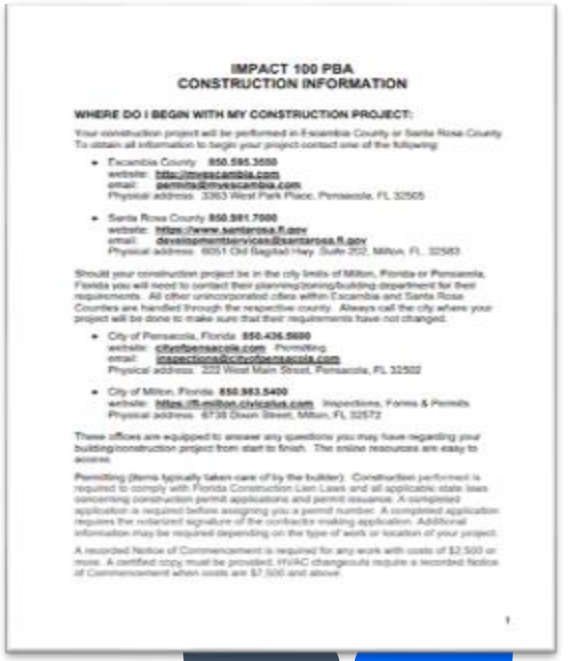
Get Inspired!!

Review Project Summary, Description & Impact

Continuing our Virtual Field Trip

- Now Navigate to:

  NONPROFITS > Construction Resources


IMPACT 100 PBA
CONSTRUCTION INFORMATION

WHERE DO I BEGIN WITH MY CONSTRUCTION PROJECT:

Construction Resources Website Document Contents

- **Where to Begin** (page 1)
- **Expected Documentation** (page 2): What do you include with your IMPACT 100 Application?
  - Contractor's License & Insurance
  - Plans / Specifications
  - Cost Breakdown
- **List of Items that Require Permits** (page 3)
- **Definitions of Contractor Types** (page 4 & 5)

Does your Project include any of the following Construction Components?

* Does your project include any of the following construction components? Please check all that apply.	☐ HVAC	☐ Electrical	☐ Plumbing
	☐ Roofing	☐ Demolition	☐ Movement and/or addition of walls
	☐ Window or door replacement	☐ Utility/storage shed placement with a poured concrete or cement slab	☐ Gas and/or water services
	☐ Sink, faucet, toilet, or shower upgrade or installation	☐ Water heater installation or replacement	☐ Fencing installation
	☐ Update or add ceiling fans or light fixtures	☑ None of the above apply	

Estimates/Bids

- You must obtain one (1) written bid. Two (2) written bids shows your due diligence in researching options and provides comparison.

- PROTECT your Org, your Employees, and your Clients:
  - Ensure your contractor has General Liability and Worker's Comp insurance
  - Ask to be added as an insured on their COI and get a copy
  - Ask your insurance broker if you need a Builder's Risk policy for your project with construction components

Permitting

- Contractors / Subcontractors pull permits

  (*an organization cannot pull permits like a homeowner can)

- You can meet with your city and/or county officials DURING DESIGN of your project to ensure it meets regulations for FREE

  (You avoid costly delays and changes later)

- Permits can be costly – include them in your budget

Other Typical Project Costs

- Architectural Fees
- Design Consultants (Surveyor, Civil/Structural Engineer)
- Permit Fees
- Landscaping

Project Budget

- EVERYONE Please understand – the budget you submit with your application **becomes the Standard you are held to** when we disperse funds! *Your Budget=Expected Payments!*

- COMMON Q - How do I handle cost increases?

  (Time elapses from grant submission to project start and sometimes costs increase - or we even have something like a *pandemic*?)

  - Consider adding line items to your budget that are <u>NOT immediate requirements to a successful project completion</u>. You can use these monies for cost increases and fund these non-essential line items elsewhere or later,
    - Examples: Landscaping or Furniture

So – WHY is all of this Required in the IMPACT 100 Application?

We want to help ensure:

- You, Your Employees, Your Volunteers, and Your Clients are SAFE & HEALTHY!
- Your organization is avoiding delays and extra costs by following legal County &/or City guidelines
- Your project is constructed well and by reputable vendors
- Your project is right on target!

15 Minute Break

Mr. Darrick D. McGhee, Sr.

Impact Now, Impact Forever

STRATEGIC INFLECTION POINT

TODAY'S PURPOSE

"If you're wondering if you can make a real impact, the answer is, YES. You may not realize it, but every major invention and investment began from at least one person's desire to impact. It starts there. Remember,

Impact Now, Impact Forever."

STRATEGIC INFLECTION POINT

WHEN YOU THINK IMPACT!

STRATEGIC INFLECTION POINT

IMPACT NOW, IMPACT FOREVER

STRATEGIC INFLECTION POINT

Once you know
your why, you can
survive
almost any how.

STRATEGIC
INFLECTION POINT

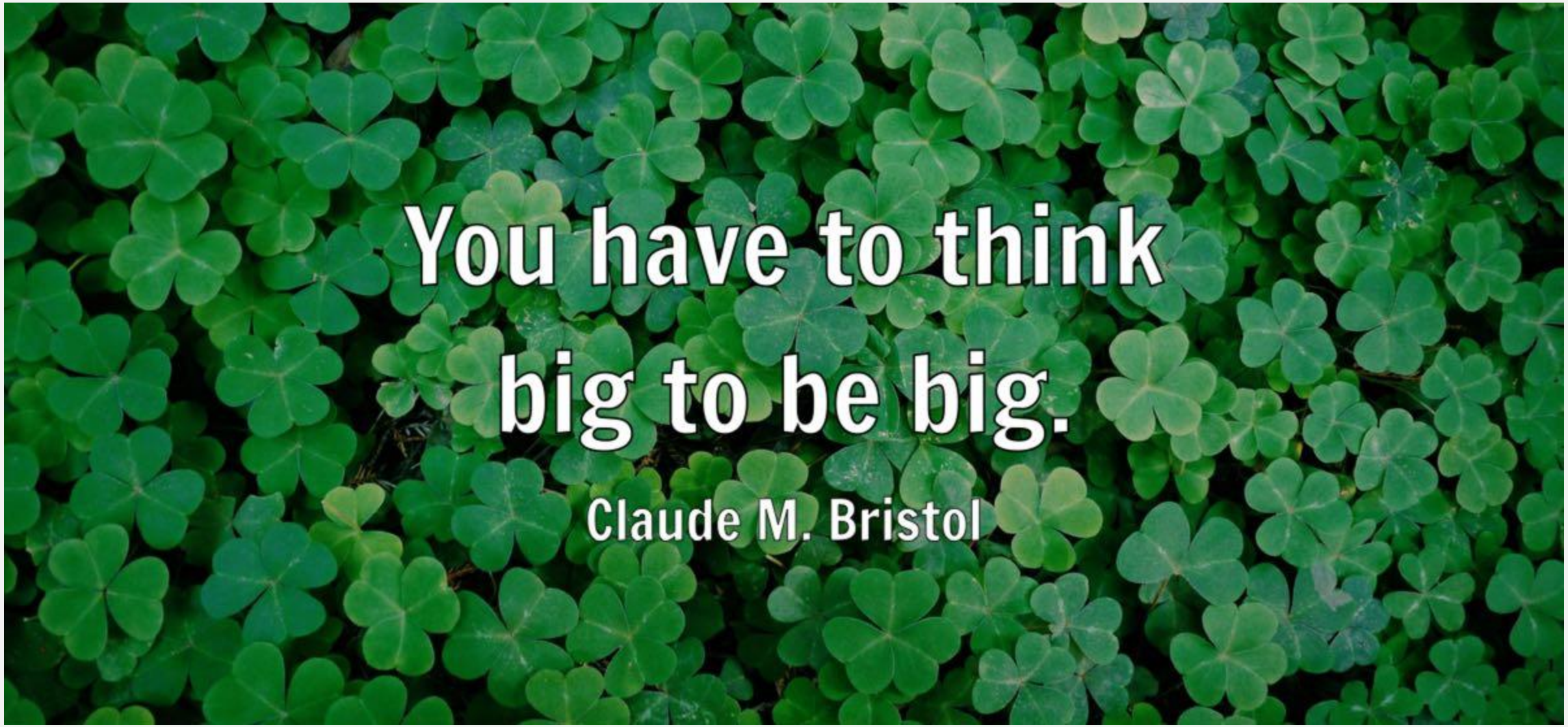
WHEN YOU WANT TO GIVE UP!

STRATEGIC INFLECTION POINT

IMPACT NOW, IMPACT FOREVER

- Even when you do not believe you are ready to apply, apply anyway because it starts there.
- Even when you do not believe you are in a position to impact, change your thinking.
- Even when you did not succeed the first time, use it as motivation not discouragement.
- Start with the end in mind because that's the real goal.

STRATEGIC INFLECTION POINT



STRATEGIC
INFLECTION POINT

WHEN YOU WONDER WHAT TO THINK!

STRATEGIC INFLECTION POINT

IMPACT NOW, IMPACT FOREVER

- How does this initiative support our strategic goals?
- What should we stop doing in order to devote the attention this project needs?
- How does this benefit our end users (the public, our constituents, our customers, etc.)? Is there something we could add or subtract that would make them really love this?
- Is this scalable? If we're successful, how would we expand it to meet bigger needs?

STRATEGIC INFLECTION POINT

Shine your light and make a positive impact on the world; there is nothing so honorable as helping improve the lives of others.

- Roy T. Bennett

STRATEGIC INFLECTION POINT

STRATEGIC
INFLECTION POINT

PHONE:
(850) 321-6489

E-MAIL:
darrick@strategicinflectionpoint.com

WEBSITE:
www.strategicinflectionpoint.com

Amanda Hindsman

Grants Chair, IMPACT 100 Pensacola Bay Area

Community Force Tips & Tricks

IMPACT 100 – Community Force Hints

- **Browser** – The Community Force application works best using Google Chrome or Firefox.
- **Make a working copy in Notepad** - Many of our nonprofits find it helpful to use the sample grant application available on our website and answer the questions in another application such as Notepad. Then as you are entering your application in Community Force, you can copy and paste from your other application into the Community Force questions. This also protects you in case there is any kind of issue that causes you to lose your Community Force session.
- **Save frequently** - We advise you to save frequently in Community Force to be sure that you don't lose your work. There is an Autosave feature in Community force. It does ensure that you are saving at least every 30 minutes, but it returns you to the top of the section you are working on after the auto-save. After an auto-save, you will need to scroll down to where you were working to continue. At the top of the section you are working on, there is a button that tells you how much more time there is before an auto-save and there is a button that allows you to stop the auto-save feature while you are working on that section.
- **Special Character "<" Not Allowed** – You can include letters and numbers in your Community Force responses, as well as any special characters (e.g., ! %, > ?,#) **except** the less than symbol ("<"). If you use "<", Community Force will drop it from your text but will not give you an error message.
- **Minimum and Maximum Word Count** – Essay box questions generally have a minimum and maximum word count. Those minimums and maximums are noted in bold, italicized print below the essay box. If your response is not in that word count range, you will get an error message in red italicized print below the essay box after you Save. If you press Save and Return to Dashboard, you will not be returned to the Dashboard until you correct the error.
- **Allow pop-ups for Community Force** – In your browser, allow pop-ups for the Community Force application to ensure that you see all of the information applicable to your grant application.
- **Submitting Your LOI or Application** – After you have completed your LOI (or later your application) and you are ready to Submit it, return to your Dashboard. There is a red button at the top right of the screen – "Final Review and Submit." Press that button.

You will get a system alert asking you to review your LOI (or later your application). Press Continue with Review and you will get a preview copy of your LOI (or later your application) to review.

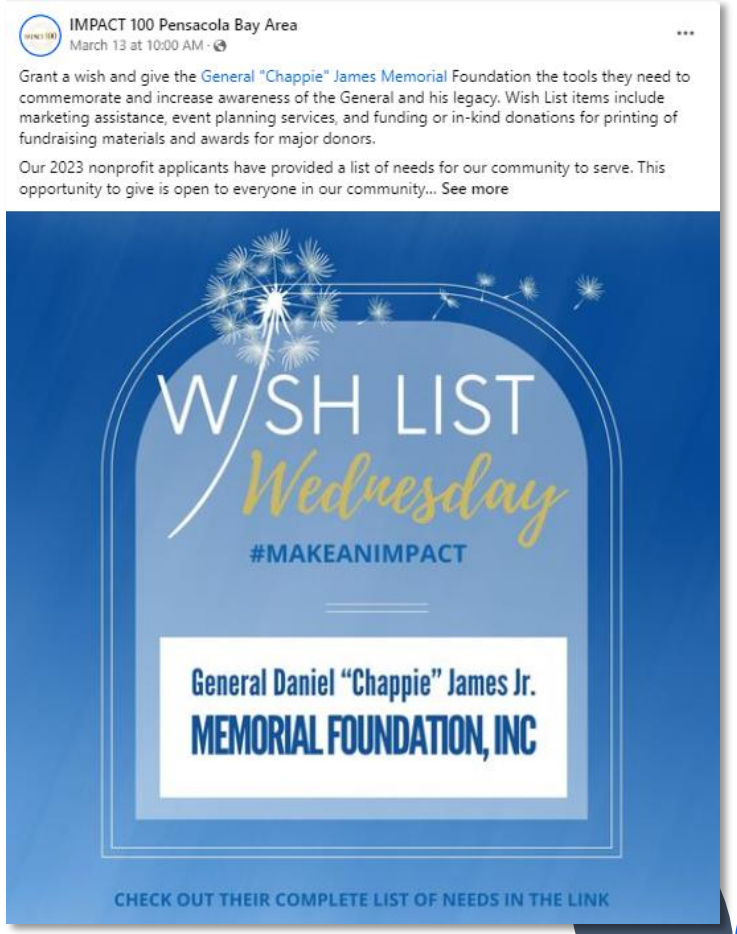
If you are satisfied with your LOI (or later your application) after reviewing it, scroll to the bottom of the page. Click on the Check Box to indicate that you have completed your review and are ready to Submit. Then click the blue Submit button. You will get a confirmation that you have submitted the LOI (or later the application).

- **Troubleshooting**
  - If you press Save and Return to Dashboard but Community Force doesn't return you to the Dashboard, there is an error somewhere in the section you are working on. Scroll up to find an error message in red italicized print below the box where you entered your information. Correct the error and then you can proceed to Save and Return to Dashboard.
  - If you pushed a button on the application and it seems like nothing is happening, look at the browser tab. If Community Force is "thinking", there will be a circular icon on the tab that moves until the application is ready for you to proceed. If you don't see such an icon, try pressing your button again.
  - If you are entering data and you are not getting the responses you expect, you can try clearing your cookies to ensure that no prior information is being picked up.
  - If you are having problems that you can't resolve, email us at grants@impact100pensacola.org and someone will get back to you to help you out.

Annual Meeting/Million Dollar Sunday

Are You & Your Organization Ready to Hold a Check This Year?

Wish Lists & Wish List Wednesday



Q&A Panel Discussion

- **Alex Gartner**, Pensacola Children's Chorus
- **Tom Anderson**, Navarre Beach Sea Turtle Conservation Center
- **Kyle Schoolar**, Feeding the Gulf Coast
- **Jan Pacenta**, Financial Reviewer, IMPACT 100 PBA
- **Martha Holden**, President Elect, IMPACT 100 PBA
- **Carrie Gaut**, Grants Co-Chair, IMPACT 100 PBA
- **Derrick McGhee**, President & CEO, Strategic Inflection Point

Raise Your Hand If...

- If this is your first time attending the Nonprofit Workshop?
- If you met a new contact here today?
- If you have a better understanding of the grant application timeline and deadlines?
- If you have already submitted your LOI?
- If you will be submitting your LOI by noon on April 30th?
- If you make a difference in our community?

Real-Time Feedback

IMPACT 100 Board Members

Send impact100pba146 to 22333

How did you hear about today's IMPACT Non Profit Workshop? (Choose all that apply)

(A) IMPACT 100 Website

(B) Email

(C) Social Media

(D) Friend or colleague

(E) Radio

Send impact100pba146 to 22333

Send impact100pba146 to 22333

How helpful were the IMPACT 100 board members in answering your questions or concerns?

(A) Extremely helpful

(B) Helpful

(C) Somewhat helpful

(D) Not helpful

(E) N/A

Send impact100pba146 to 22333

How likely are you to attend a future IMPACT 100 session or recommend to a friend or colleague?

(A) Likely

(B) Not Likely

(C) Not sure

Send impact100pba146 to 22333

Overall, how would you rate today's Session?

(A) Excellent

(B) Good

(C) Fair

(D) Poor

Thank you for attending!

Remember!
We will help you every step of the way

Submit your questions to:
grants@impact100pensacola.org