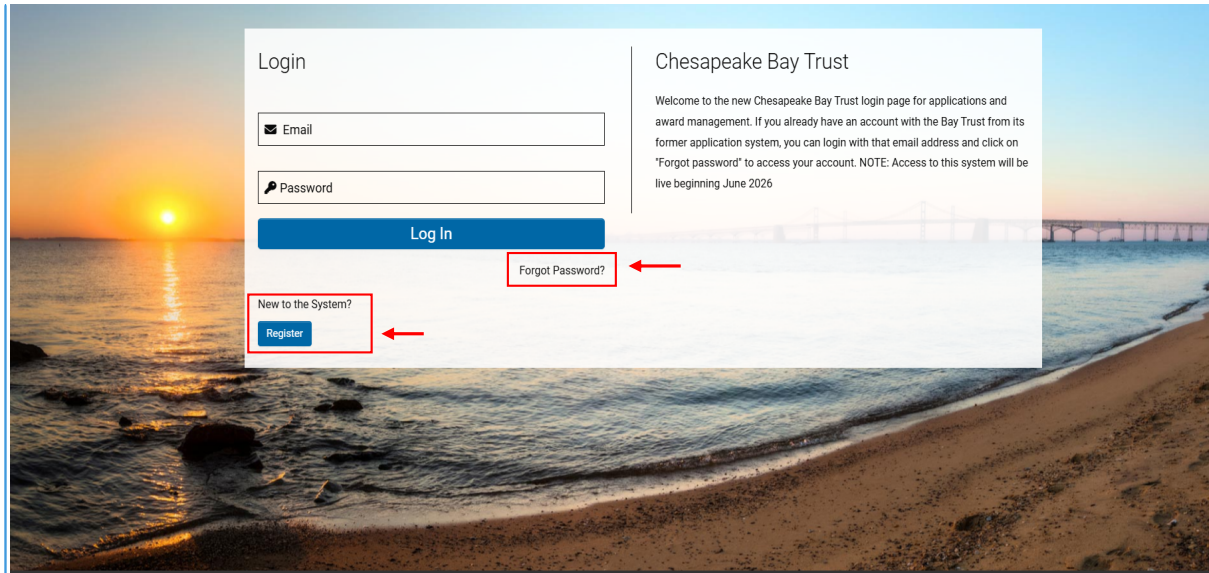


SmartSimple User Guide

Part I: Getting Started

Registration and Logging In

To register and/or login to the system, use the following link: https://chesapeakebaytrust.us-1.smartsimple.com/s_Login.jsp
This link will take you the landing page pictured below.



Commented [AT1]: Picture will need to be updated when this page is completed.

If you or your organization had an existing account in our previous system, Blackbaud Grantmaking, those accounts will have transferred over to SmartSimple automatically. To log into that account, click on “Forgot Password?” below the login button. Enter the email address you used to apply to or manage awards in Blackbaud Grantmaking and click submit. Within ten minutes, a reset password link will be sent to the email you entered. Make sure to check your spam and junk folders if you do not see it. Click the link provided in that email and create a new password, then use that password and email to login to the system.

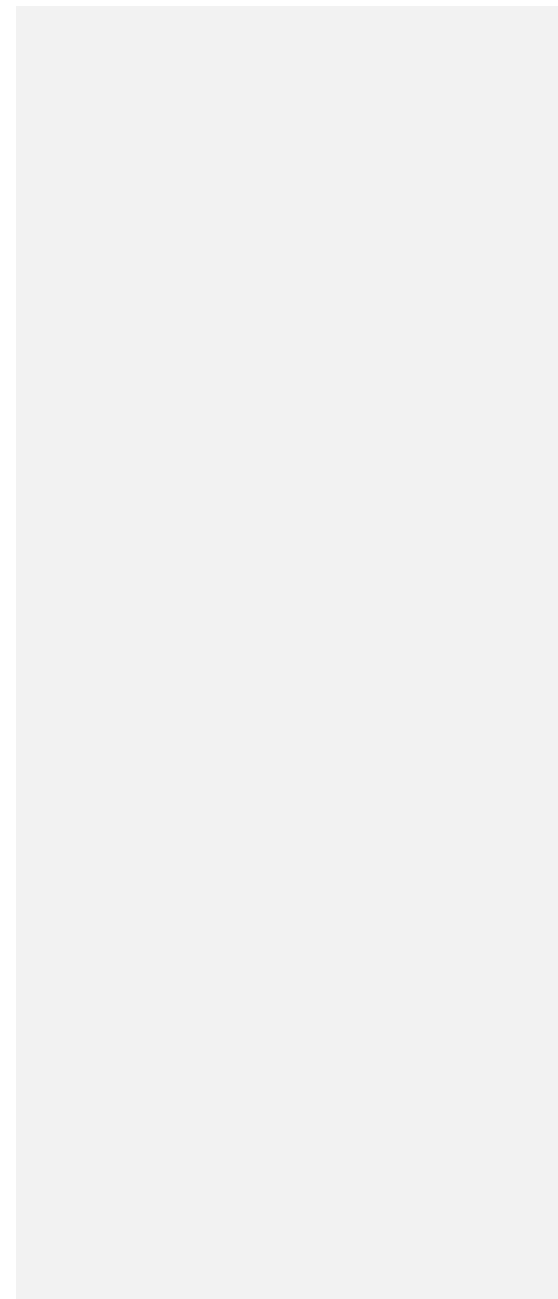
Registering as a First-Time User

If you did not have an account in Blackbaud Grantmaking, click the blue “Register” button in the bottom left to create a new account. Once you click Register, you will be prompted to select what entity you are applying as. Choose the option that pertains to you. For example: if you are applying for a rebate, select **Individual**. If you are applying for a grant on behalf of a non-profit, select **Non-profit Organization**.

Registration Options

I am applying as:

- Non-profit Organization**
Register yourself and your organization.
- Educational Institution**
Register yourself and your organization.
- For-profit Organization**
Register yourself and your organization.
- Individual**
Register yourself as an individual.
- Government**
Register yourself and your organization.



Registering Your Organization

If you select any of the organization or institution options, you will first be prompted to search for your organization. Follow the instructions below.

Organization Search

i Instructions:

1. Enter your organization **name** (keyword search is sufficient, example: "Waco" instead of "The Waco Foundation") or Enter your organization **EIN** (do not include spaces or dashes, example: 123456789).
2. Click "Search"
3. Click on the name of your organization in the search results.
4. If you are unable to find your organization in the IRS database please [click here](#) to add it

?

?

?

Once you've searched for and selected your organization, fill in any remaining blanks in the Organization Information section. If your organizational contact does not populate after searching, you can search the IRS database as indicated. If your organizational bank account does not match your organizational name, please reach out to Trust staff for more detailed instructions.

Registering as an Individual

This is the last step of registration if you are registering on behalf of an organization, and the only step if you are registering as an individual. You will be prompted to enter your full name and contract information. Enter this, complete the CAPTCHA and click submit.

Contact Information

[Already have an account? Login](#)


Instructions

Required fields are marked with an asterisk "*".

* First Name


* Last Name

* Email

* Phone 

Phone Ext

I'm not a robot
This site is exceeding reCAPTCHA Enterprise free quota.


reCAPTCHA
Privacy - Terms

Submit

Within 5 minutes, an email with the subject “Welcome: Chesapeake Bay Trust User Information” will be sent to your provided email address. Use the **first link** in the email to create a password for your account. You can then return to the login landing page and use your email address and newly created password to login to the system.

Getting Started with SmartSimple

After you’ve logged into the system for the first time, you will see the following landing page.

The screenshot shows the landing page of the Chesapeake Bay Trust Grant Portal. At the top, there is a blue header with the text "Welcome to the Chesapeake Bay Trust Grant Portal". Below the header, there are three main navigation options: "Funding Opportunities" (with a magnifying glass icon), "My Profile" (with a person icon), and "Organization Profile" (with a building icon). Red arrows point from red text boxes below each icon to the icons themselves. The text boxes contain: "Use to search for open grant programs.", "Use to view and edit your profile.", and "Use to view and edit your organization's profile." Below the navigation options, there are two sections: "Action Items" and "Completed Items". The "Action Items" section has a sub-header "APPLICATIONS (1)" and a table with columns: #, Application ID, Type, Project Name, Organization, Primary Contact, and Status. A red arrow points from the text "Applications and reports in progress will be displayed here." to the "Draft" status in the table. The "Completed Items" section has a sub-header "COMPLETED APPLICATIONS (5)" and a table with columns: #, Application ID, Application Type, Organization, Primary Contact, Approved Amount, Status, and Last Modified. A red arrow points from the text "Completed applications and reports will be displayed here." to the "Approved" status in the table.

Welcome to the Chesapeake Bay Trust Grant Portal

Funding Opportunities
Use to search for open grant programs.

My Profile
Use to view and edit your profile.

Organization Profile
Use to view and edit your organization's profile.

Action Items

APPLICATIONS (1) | REPORTS & CONTINGENCIES (8) | AGREEMENTS (2)

#	Application ID	Type	Project Name	Organization	Primary Contact	Status
1	2025-1173 CHESAPEAKE BAY TRUST	Grants		CHESAPEAKE BAY TRUST	Abigail Thompson	Draft

Applications and reports in progress will be displayed here.

Completed Items

COMPLETED APPLICATIONS (5) | COMPLETED ACTIVITIES (0)

#	Application ID	Application Type	Organization	Primary Contact	Approved Amount	Status	Last Modified
1	2026-1239 CHESAPEAKE BAY TRUST	Grants	CHESAPEAKE BAY TRUST	Abigail Thompson	\$124,986.00	Approved	02/05/2026 08:36AM

Completed applications and reports will be displayed here.

You can use the buttons in the top module to search for funding opportunities and view and edit both your profile and your organization's profile. There are also dashboards that track your applications and reports in progress, as well as those that have been completed.

Before you start exploring the site, please check your profile and your organization's profile to make sure that all information has been entered correctly.

Setting Up Your Profile

Select the *My Profile* button to view and edit your profile. Most of your basic information will have imported from registration, but you will have the option to add additional information such as your title, alternate phone numbers, and address (please note that this will only be available if you registered as an individual).

Required fields are marked with a red asterisk. Make sure that all required fields have been filled out before proceeding.

The screenshot shows a web interface for editing a user profile. The user is Abigail Thompson. The form includes the following fields:

- First Name:** Abigail
- Last Name:** Thompson
- Title:** (empty)
- Prefix:** (empty)
- Suffix:** (empty)
- Phone:** 443-405-8499
- Email:** athompson@lakeorg@cbttrust.org
- Organization:** CHESAPEAKE BAY TRUST
- Address:** (empty)
- Address 2:** (empty)
- City:** (empty)
- Country:** United States
- State:** -- Select One --
- Zip Code:** (empty)

Below the main form is an "Additional Information" section with the following fields:

- Phone Ext:** (empty)
- Alternate Phone & Ext:** (empty)

A "Save" button is located at the bottom of the form.

If you ever need to update any of your personal information, you can do so here.

Setting Up Your Organization's Profile

Select the *Organization Profile* button to view and edit your organization's profile. As with your individual profile, most information will have imported from registration, but you will be able to add additional information as well.

The screenshot shows a web application interface for editing an organization's profile. The page title is "CHESAPEAKE BAY TRUST". The form contains several sections:

- Organization Name:** CHESAPEAKE BAY TRUST
- Address:** 108 SEVERN AVE
- Address 2:** (empty)
- City:** ANNAPOLIS
- Country:** United States
- State:** Maryland
- Zip Code:** 21403-2612
- EIN Number:** (empty, with a note: "If you do not have an EIN, enter tax ID number.")
- Executive Officer:** Jana Davis
- Organization Type:** Non-profit Organization
- Specific Organization Type:** 501(c)(3) Organization
- SAM UEI Number:** MDEWF0B30BNS
- Mission Statement:** (empty)

The left sidebar shows navigation options: Main, Sub-Organizations, Calls, and More... The top right corner has a notification bell and a user profile icon.

If you want to make additional edits later, click “save” and then select “Home” in the upper left corner to return to the landing page. Please note that all required fields must be filled out in order to successfully save.

SmartSimple User Guide

Part II: Submitting an Application

Viewing Funding Opportunities

Login to SmartSimple. On the home page, select “Funding Opportunities”.

The screenshot shows the home page of the Chesapeake Bay Trust Grant Portal. At the top left is the logo and 'Home' link. The main header area contains a welcome message and three navigation buttons: 'Funding Opportunities' (highlighted with a red box and arrow), 'My Profile', and 'Organization Profile'. Below the header is an 'Action Items' section with a table showing zero applications. Below that is a 'Completed Items' section with a table showing one completed application.

Welcome to the Chesapeake Bay Trust Grant Portal

[Funding Opportunities](#) [My Profile](#) [Organization Profile](#)

Action Items

APPLICATIONS (0) | REPORTS & CONTINGENCIES (1) | AGREEMENTS (0) | REVIEWS PENDING (0)

#	Application ID	Application Type	Organization	Project Title	Primary Contact	Amount Requested	Program Area
No Results Found							

[Show More](#)

Completed Items

COMPLETED APPLICATIONS (1) | COMPLETED ACTIVITIES (0)

#	Application ID	Application Type	Organization	Project Title	Primary Contact	Amount Requested	Program Area
Open	1	1342 The Environment Method	Mini-Grant	The Environment Method	Abigail Thompson	\$10,000.00	Anne Arundel County Community Tree Planting

[Show More](#)

You will then be brought to a page that shows all open calls for applications. If you are looking for a specific program, you can use the bar in the top right to search for it. Otherwise, you can browse through the open calls; each one will show you the title of the grant program, type of program, deadline for submission, and a link to download the terms and conditions. When you've located the program you'd like to apply for, click the blue "Apply Now" button underneath the call.

The screenshot shows the 'Funding Opportunities' page of the Chesapeake Bay Trust website. At the top left is the Chesapeake Bay Trust logo and a 'Home' link. The main heading is 'Funding Opportunities'. Below this, a red annotation 'Use to search for open funding opportunities.' points to a search bar. The search bar contains the text '1-6 of 6' and navigation arrows. Below the search bar, there are three columns of funding opportunities. Each column has a placeholder image, a list of logos, and an 'Apply Now' button. The first opportunity is 'Capacity Building Initiative - Organizational Grants' with a deadline of 08/31/2026 12:00 AM. The second is 'FY26 - Anne Arundel County Community Tree Planting Mini - Rolling Mini-Grant' with a deadline of 07/31/2026 12:00 AM. The third is 'FY26 - City of Annapolis Electric Leaf Blower Rebate - Rolling Rebate' with a deadline of 09/30/2026 12:00 AM. A red annotation 'Click to begin an application.' points to the 'Apply Now' button of the first opportunity. At the bottom center of the page is the number '9'.

Starting your Application

When you begin a new application, you will first be prompted to complete an eligibility quiz. This will confirm if you (or your organization) meet the minimum requirements of the award program you are applying to. After you've answered all of the questions, click "Save Draft".

The screenshot shows the 'New Application' page on the Chesapeake Bay Trust website. The page features a dark sidebar with 'PAGE NAVIGATION' and a 'Main' button. The main content area has an 'Actions' dropdown and a 'New Application' heading. A light blue information box contains instructions: 'Please complete the mandatory questions below.', 'Click 'Save Draft' to populate the submit button below.', and 'If you wish to communicate with staff regarding your application, use the Notes tab located within the left side menu.' Below this is the 'ELIGIBILITY QUIZ' section, which includes an introductory sentence: 'The following eligibility quiz is meant to assist you in determining if your project meets the requirements of this award program and that your staff/organizational structure best supports a successful application.' There are three questions, each with a 'Select One' dropdown menu:

- * Is the organization name under which you are applying and with which you are associated the same organization name under which the project will be undertaken (and therefore the organization to which any award funds would be dispersed), should the request for funding be approved (not all requests for funding will result in an award)?
- * Do you, as the individual submitting the application, agree that you are also the Project Lead for the project (for definition of "Project Lead," please refer to the RFP) and understand you will be the primary point of contact for the application and, should it be successful, the ensuing award?
- * Have you read/reviewed the Chesapeake Bay Trust program Request for Proposal (RFP) to ensure that you meet all the eligibility requirements?

At the bottom of the form is a blue 'Save Draft' button.

Once you've saved, two new fields will appear: "Submit" on the bottom bar and "Notes" on the side bar.

The screenshot displays the Chesapeake Bay Trust application portal. On the left, a dark sidebar contains a 'PAGE NAVIGATION' menu with 'Main', 'Notes', and 'More...' options. A red arrow points to the 'Notes' option. The main content area is titled '1343 The Environment Method' and includes an 'Application Summary' section and an 'ELIGIBILITY QUIZ'. The quiz contains three questions, each with a 'Yes' dropdown menu. At the bottom of the form, there are two buttons: 'Save Draft' and 'Submit'. A red arrow points to the 'Submit' button.

If you have an issue with the SmartSimple system at any time during your application, you can add a note in the “Notes” section on the left side bar. Trust staff will be alerted when you submit a note and can help to troubleshoot the issue. The Notes feature should only be used for system-related issues and questions. Any programmatic questions should be directed to the staff contact listed on the RFP of the call you are applying to.

When you’ve completed the eligibility quiz, click “Submit”. If your answers indicate that you are not eligible for the funding opportunity, you will see the following message:

Eligibility Failed

You answered no to one or all of the questions, indicating this may not be the correct fit. To be eligible to apply, you must answer yes to all the questions. Click the 'back' button twice look at the questions again or click 'home' to start a new application. Contact the Trust at 410-974-2941 or grantsadmin@cbtrust.org for assistance.

If you receive this message but believe you should be eligible for the program, please go back and review the RFP. If you still have questions, contact the staff lead for the RFP.

If you pass the eligibility quiz successfully, you will be able to move forward with the rest of your application.

The screenshot shows the Chesapeake Bay Trust application portal. At the top left, there is a navigation menu with 'Main', 'Notes', and 'More...'. The main content area is titled '1344 The Environment Method'. A red box highlights the 'Application Summary' tab in the navigation bar, with a red arrow pointing to it. Below the navigation bar, there is a section for 'Invite Collaborators' with a table that has columns for 'Prefix', 'First Name', 'Last Name', 'Email', 'Role', and 'Status'. The table is currently empty, and the text 'No Results Found' is displayed. At the bottom of the form, there are buttons for 'Save Draft', 'Submit', 'Withdraw', and 'Next >'. A red box highlights these buttons, with a red arrow pointing to the 'Next >' button.

You can use the tab in the center of the screen or the “Next” and “Back” buttons to navigate between different sections of your application. At any time, you can use the “Save Draft” button at the bottom of the screen to save your progress. This will allow you to pick back up where you left off if you leave the application portal (please note: the application portal does not auto-save. Be sure to save frequently to avoid losing any of your progress). You can also use the “Application Summary” button above the central tabs to download a PDF of your application. If you’d like to delete your application for any reason, you can do using the “Withdraw” button.

After you’ve saved your application for the first time, you will be able to access it from the Home page. All applications in progress will be listed in the Action Items section. Click the “Open” button to return to your application and continue making edits.

The screenshot shows the Chesapeake Bay Trust Grant Portal interface. At the top, there is a navigation bar with the Chesapeake Bay Trust logo, a 'Home' button, and notification icons. Below the navigation bar is a large blue banner with the text 'Welcome to the Chesapeake Bay Trust Grant Portal' and three main navigation options: 'Funding Opportunities', 'My Profile', and 'Organization Profile'. The main content area is divided into two sections: 'Action Items' and 'Completed Items'. The 'Action Items' section is highlighted with a yellow border and contains a table with one row of data. The 'Completed Items' section contains a table with one row of data. A red box highlights the 'Open' button in the 'Action Items' table, with a red arrow pointing to it.

Action Items

APPLICATIONS (1) | REPORTS & CONTINGENCIES (1) | AGREEMENTS (0) | REVIEWS PENDING (0)

#	Application ID	Application Type	Organization	Project Title	Primary Contact	Amount Requested	Program Area
Open	1	1344 The Environment Method	Grants	The Environment Method	Abigail Thompson		Capacity Building

[Show More](#)

Completed Items

COMPLETED APPLICATIONS (1) | COMPLETED ACTIVITIES (0)

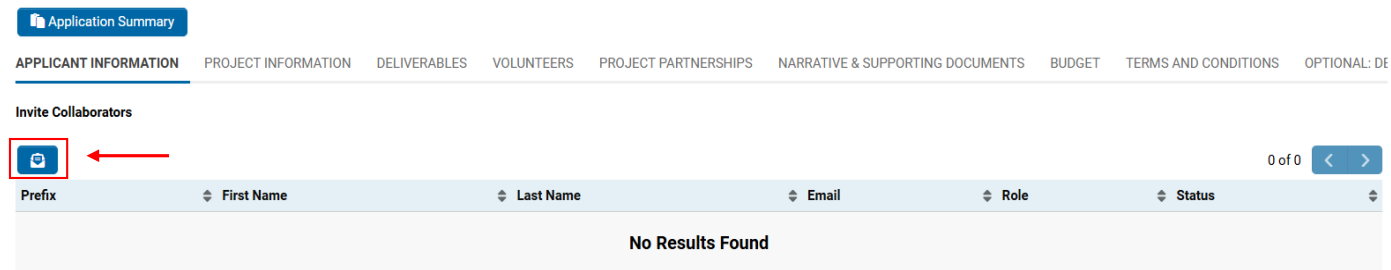
#	Application ID	Application Type	Organization	Project Title	Primary Contact	Amount Requested	Program Area
Open	1	1342 The Environment Method	Mini-Grant	The Environment Method	Abigail Thompson	\$10,000.00	Anne Arundel County Community Tree Planting

[Show More](#)

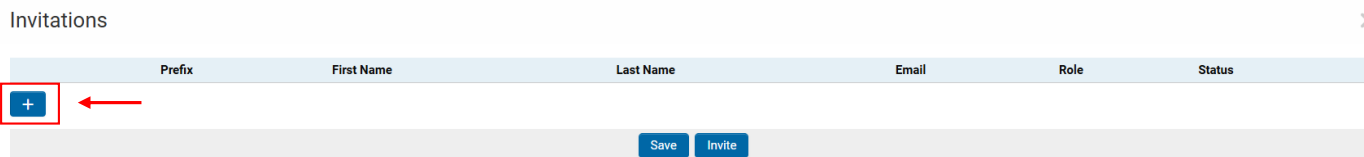
Applicant Information

Some information on your application – for example, organization and primary contact information -- will auto-generate based on your organization and individual profiles. To change this information, you will have to return to the Home page and enter the “My Profile” or “Organization Profile” portals. Make sure to save first!

If you’d like to add a collaborator to your application, you can do so in the Application Information section. Select the envelope icon underneath “Invite Collaborators”, then click the plus icon in the resulting pop-up to add in the information of the person you’d like to invite.



The screenshot shows the 'Application Summary' navigation bar with 'APPLICANT INFORMATION' selected. Below it, the 'Invite Collaborators' section is visible. A red box highlights an envelope icon, with a red arrow pointing to it. To the right of the icon is a '0 of 0' indicator and navigation arrows. Below the icon is a table with columns: Prefix, First Name, Last Name, Email, Role, and Status. The table content is empty, displaying 'No Results Found'.



The screenshot shows the 'Invitations' pop-up window. It has a table with columns: Prefix, First Name, Last Name, Email, Role, and Status. A red box highlights a plus icon in the top-left corner of the table area, with a red arrow pointing to it. At the bottom of the pop-up, there are 'Save' and 'Invite' buttons.

Once you've finished adding collaborators, click "Invite". This will automatically send an email to the listed individuals, inviting them to collaborate on the application. If they accept the invitation, they will receive another email inviting them to login to the system, or create an account if they have not already done so.

Prefix	First Name	Last Name	Email	Role	Status
Mr	John	Bay	jbay@chesapeake.trust	Collaborator	Draft

+ Save Invite

You should now be able to see the name, contact information, role, and status of your collaborators on the Applicant Information section.

Application Summary

APPLICANT INFORMATION PROJECT INFORMATION DELIVERABLES VOLUNTEERS PROJECT PARTNERSHIPS NARRATIVE & SUPPORTING DOCUMENTS BUDGET TERMS AND CONDITIONS OPTIONAL: DE

Invite Collaborators

Prefix	First Name	Last Name	Email	Role	Status
Mr	John	Bay	jbay@chesapeake.trust	Collaborator	Invited

1-1 of 1

Filling Out Your Application

After verifying your applicant and organization information, you can proceed to work through the remaining sections. Each application will contain the following sections:

Project Information: use this tab to provide a basic, high-level summary of your project’s details, such as what you plan to accomplish, what the timeframe is, and where the project will take place.

APPLICANT INFORMATION **PROJECT INFORMATION** DELIVERABLES VOLUNTEERS PROJECT PARTNERSHIPS NARRATIVE & SUPPORTING DOCUMENTS BUDGET TERMS AND CONDITIONS OPTIONAL: DE >

Project Title and Abstract

* Project Title

* Project Description
Provide a brief (3-4 sentences) summary of the project, including details such as type of project, location, and main objectives. The project abstract should be succinct and provide a clear idea of the project description outputs based on intended outcomes.

JUMP TO
Project Title and Abstract
Project Information

Deliverables: if awarded, these metrics will be tracked throughout your project term as an evaluation tool. In addition, the Trust uses these metrics in our annual report as well as reports sent to our partners and local legislators to show the impact of awarded projects. Not all deliverables will be relevant to your project. If a deliverable does not apply to your project, you can leave it blank.

APPLICANT INFORMATION PROJECT INFORMATION **DELIVERABLES** VOLUNTEERS PROJECT PARTNERSHIPS NARRATIVE & SUPPORTING DOCUMENTS BUDGET TERMS AND CONDITIONS OPTIONAL: DE >

Enter the estimated number of project participants, outreach outputs, or restoration outputs for your proposed project below.
Enter only those that apply to your project; leave others blank.

Project Participation

Number of Volunteers

Number of Volunteers of Color


JUMP TO
Project Participation
Outreach Outcomes
Restoration Outcomes

Volunteers: if applicable to your project, provide a description of volunteer activities, total number involved, and total number of hours each volunteer committed to your project.

APPLICANT INFORMATION PROJECT INFORMATION DELIVERABLES **VOLUNTEERS** PROJECT PARTNERSHIPS NARRATIVE & SUPPORTING DOCUMENTS BUDGET TERMS AND CONDITIONS OPTIONAL: DEM


Please enter individual volunteer activities, the number of volunteers that will be performing the activity, and the total number of hours those volunteers will commit to the individual activity. The total number of hours should be the total of all hours worked on that activity. So if you have 3 volunteers and each will spend 3 hours on the activity then the total number of hours would be 9.

Volunteers

 ←

Volunteer information is added through a table, which can be opened by clicking the blue “Add Volunteers” button. Once you’ve opened the table, click the plus sign button to add a new line. When you’re finished adding volunteers, click the “Save” button before exiting the table.

Volunteers

 Please enter individual volunteer activities, the number of volunteers that will be performing the activity, and the total number of hours those volunteers will commit to the individual activity. The total number of hours should be the total of all hours worked on that activity. So if you have 3 volunteers and each will spend 3 hours on the activity then the total number of hours would be 9.

Volunteers

Volunteer Activities	Total Number of Volunteers	Total Number of Hours
	0	0



→  

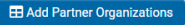
Partnerships: Provide a list of partner organizations, individuals, their area of expertise, and their roles in your project. Applicants are highly encouraged to provide letters of commitment for partner organizations outlining the partners' roles. As with volunteers, partner information can be added by clicking the blue "Add Partner Organizations" button and entering information into the resulting table.

APPLICANT INFORMATION PROJECT INFORMATION DELIVERABLES VOLUNTEERS **PROJECT PARTNERSHIPS** NARRATIVE & SUPPORTING DOCUMENTS BUDGET TERMS AND CONDITIONS OPTIONAL: DEM

List each partner organization, identify individuals at each organization who will be involved, identify their areas of expertise, and describe the specific role(s) each will play in implementing the project. Applicants are strongly encouraged to upload a letter of commitment for the project from each partner describing in detail the partner's role in or contribution to the project. Partners can include contractors as well as community groups working with you on your project. Applications including strong letters of commitment often receive higher scores. If not submitted with application, letter(s) of and commitment may be required prior to the release of any awarded funding.

To better understand the Trust's definition of letter of commitment please visit our Forms and Policies webpage: <https://cbtrust.org/grants/applicant-resources-forms-policies/>

Partner Organizations




Narrative and Supporting Documents: Answer the narrative questions as completely as possible and upload any additional required documents as described in the RFP.

APPLICANT INFORMATION PROJECT INFORMATION DELIVERABLES VOLUNTEERS PROJECT PARTNERSHIPS **NARRATIVE & SUPPORTING DOCUMENTS** BUDGET TERMS AND CONDITIONS OPTIONAL: DI

Upload a Microsoft Word or PDF file containing answers to the narrative questions found in the Request for Proposals (RFP). We recommend that you download the Narrative Questions Template from the Program's webpage, populate it, and upload it here. We prefer, and our reviewers prefer, all documents be merged into one file for ease of reviewing. You are able to merge your files into a single upload into the Narrative Questions box below. For a copy of the RFP and for additional resources, see the web page [Here](#).

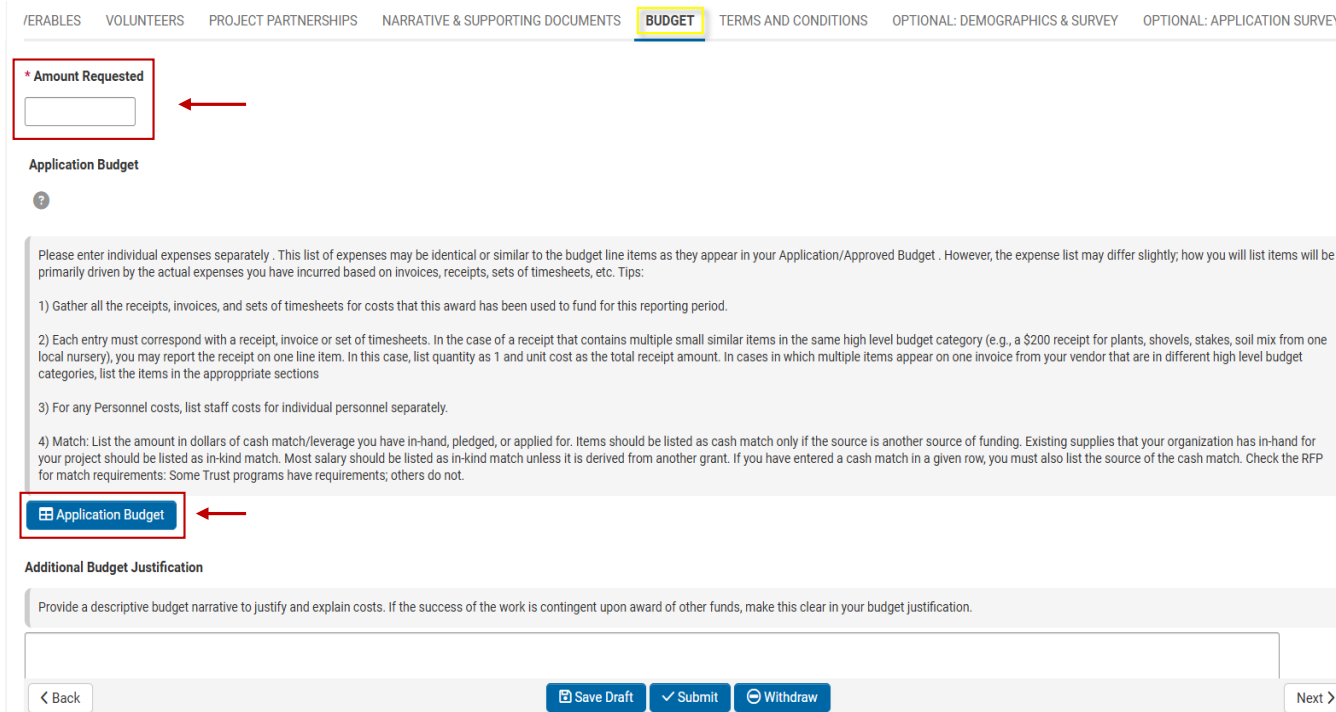
* Narrative

Merge function only works with PDFs

 Drop files here or [browse files](#)
Maximum file size: 2 GB

Filling Out Your Budget

The next tab is your project budget. First, fill out the “Amount Requested” field with the total amount of funds you are requesting for your award. Then click the blue “Application Budget” button to open the budget module.



The screenshot shows a web application interface with a navigation bar at the top containing the following tabs: /ERABLES, VOLUNTEERS, PROJECT PARTNERSHIPS, NARRATIVE & SUPPORTING DOCUMENTS, BUDGET (highlighted in yellow), TERMS AND CONDITIONS, OPTIONAL: DEMOGRAPHICS & SURVEY, and OPTIONAL: APPLICATION SURVEY. Below the navigation bar, there is a form with several sections:

- * Amount Requested**: A text input field with a red box around it and a red arrow pointing to it from the right.
- Application Budget**: A section with a question mark icon and a light gray box containing instructions and tips:
 - Please enter individual expenses separately. This list of expenses may be identical or similar to the budget line items as they appear in your Application/Approved Budget. However, the expense list may differ slightly; how you will list items will be primarily driven by the actual expenses you have incurred based on invoices, receipts, sets of timesheets, etc. Tips:
 - 1) Gather all the receipts, invoices, and sets of timesheets for costs that this award has been used to fund for this reporting period.
 - 2) Each entry must correspond with a receipt, invoice or set of timesheets. In the case of a receipt that contains multiple small similar items in the same high level budget category (e.g., a \$200 receipt for plants, shovels, stakes, soil mix from one local nursery), you may report the receipt on one line item. In this case, list quantity as 1 and unit cost as the total receipt amount. In cases in which multiple items appear on one invoice from your vendor that are in different high level budget categories, list the items in the appropriate sections
 - 3) For any Personnel costs, list staff costs for individual personnel separately.
 - 4) Match: List the amount in dollars of cash match/leverage you have in-hand, pledged, or applied for. Items should be listed as cash match only if the source is another source of funding. Existing supplies that your organization has in-hand for your project should be listed as in-kind match. Most salary should be listed as in-kind match unless it is derived from another grant. If you have entered a cash match in a given row, you must also list the source of the cash match. Check the RFP for match requirements: Some Trust programs have requirements; others do not.
- Application Budget**: A blue button with a white icon of a document and a red box around it and a red arrow pointing to it from the right.
- Additional Budget Justification**: A section with a light gray box containing the instruction: "Provide a descriptive budget narrative to justify and explain costs. If the success of the work is contingent upon award of other funds, make this clear in your budget justification." Below this is a large text input area.

At the bottom of the form, there is a navigation bar with the following buttons: < Back, Save Draft, Submit, Withdraw, and Next >

This will open a pop-up that shows the details of the budget and should match the total grant amount requested.

Each expenses should be sorted into one of six categories: personnel, supplies, contractual, travel, equipment, and other. If you are requesting indirect, there is a separate category for this as well. Descriptions of what items go in which category are written at the top of each section, and can also be found in our help documents on our website.

When filling out your budget, you will need to record each expense you expect to charge to your grant. Try to be as specific as possible – for example, plants should be broken down by species, personnel hours should be broken down employee, etc.

To add a new budget line in an expense category, click the plus sign under the category that item belongs to. Then add the title of the budget item, quantity requested, and cost per unit. Totals will be calculated automatically.

Supplies

i "Supplies" should be chosen for all supplies and materials, including plants, planting supplies, rain barrels, tools, etc. that will be purchased by the grantee organization directly. Any supplies and materials provided by partners, consultants, and/or contractors should be listed as "Contractual" (see information on this category below). List supplies separately (do not lump into one row).

Budget Item	Quantity Requested	Cost per Unit Requested	Amount Requested	Cash Match	Source of Cash Match	Status of Cash Match	In-Kind Match	Source of In-Kind Match	Status of In-Kind Match	Total
→ Maple Trees	20	\$50.00	\$1,000.00	\$200.00	Donor	Pledged			Select One	\$1,200.00
→ Oak Trees	25	\$45.00	\$1,125.00	\$200.00	Donor	Pledged			Select One	\$1,325.00
→ Shovels	15	\$35.00	\$525.00			Select One			Select One	\$525.00
			\$0.00			Select One			Select One	\$0.00
			\$2,650.00	\$400.00			\$0.00			\$3,050.00



Totals automatically generate in the gray bar at the bottom of each section.

If you have a cash match or in-kind match, you can also include that information in the budget module.

All budget information will generate in the summary table at the bottom. Make sure that the final Amount Requested total matches the Amount Requested you entered on the budget tab. If you're not sure of the exact amount you'd like to request, you can complete that field after filling out your budget.

Once you've finished your budget, click the blue "Save" button on the bottom before exiting the tab. The budget module does not save automatically. If you'd like to start over, click the "Clear" button. This will delete all data from your budget.

Total

	Amount Requested	Percent Indirect	Cash Match	In-Kind Match	Total
Total Personnel	\$7,700	0.00%	\$0	\$0	\$7,700
Total Supplies	\$2,950	0.00%	\$400	0	\$3,350
Total Contractual	\$5,000	0.00%	0	\$5,000	\$10,000
Total Travel	\$65	0.00%	0	0	\$65
Total Field Trip Fees	\$0	0.00%	\$0	\$0	\$0
Total Equipment	0	0.00%	0	0	0
Total Other	0	0.00%	0	0	0
Total Direct Costs	\$15,715	0.00%	\$400	\$5,000	\$21,115
Total Indirect Costs	\$1,500	9.55%	\$0	\$0	\$1,500
Overall Total	\$17,215	0.00%	\$400	\$5,000	\$22,615

This number should match the number entered in the Amount Requested field on the budget tab.

After saving, use the additional justification box to further explain any budget items if necessary.

Completing Your Application

After the budget tab, you will see the Terms and Conditions which will apply if your application is successful and an award is made to your organization. Click the blue link, titled “Download Terms and Conditions Here”, to view these.

APPLICANT INFORMATION PROJECT INFORMATION DELIVERABLES VOLUNTEERS PROJECT PARTNERSHIPS NARRATIVE & SUPPORTING DOCUMENTS BUDGET **TERMS AND CONDITIONS**

[Download Terms and Conditions Here](#)

* I have read, understand, and agree to the terms and conditions on this page

True

After this, there are two additional optional surveys. The first survey last tab is a demographics survey. Any information you provide as part of this survey is confidential and will not be used during the review process or considered in funding decisions. We request this information to help us understand the aggregate trends in the fields we support. We encourage applicants to view our demographic data policy on our website.

ERABLES VOLUNTEERS PROJECT PARTNERSHIPS NARRATIVE & SUPPORTING DOCUMENTS BUDGET TERMS AND CONDITIONS **OPTIONAL: DEMOGRAPHICS & SURVEY** OPTIONAL: APPLICATION SURVEY

Background

Our commitment to Diversity

The Trust engages a wide range of audiences in natural resources work. We do so for two reasons: 1) given the breadth of natural resource challenges, success will only occur if all communities are engaged and 2) healthy natural resources improve lives in various ways, so populations who are not engaged will be at a disadvantage. We further believe that organizations with missions focused on natural resource issues benefit from the engagement of a wider range of audiences.

The second survey will ask questions concerning your experience as an applicant. This survey is also confidential and is used to collect information that can help us improve the applicant experience in the future.

Thank you for applying to one of the Chesapeake Bay Trust's (Trust's) award programs. Please answer this survey on behalf of the team of people who supported the preparation and completion of the application. We will use the information you provide in this survey to improve our application processes. This survey will not be considered as part of your application or during the review process used to make funding decisions. Please be candid!

How many Financial Incentive programs with Chesapeake Bay Trust have you applied for in the last 3 years?

Once you've filled out all sections and are ready to submit your application, click the "Submit" button. If you've skipped any required questions, you will see a red box titled "Submission Failed". This will include a list of all the fields that you still need to complete.

✘ Submission Failed:

- The information provided in this application is, to the best of my knowledge and belief, accurate, truthful, and complete. I affirm that all statements and representations made are honest and accurate cannot be empty.
- Narrative must contain at least 1 file
- I have read, understand, and agree to the terms and conditions on this page cannot be empty.

If you click on any of the bullet points in the list, you will automatically be taken to the field that needs to be completed. Your application cannot be submitted until all required fields have been filled out.

If your application is successfully submitted, you will see the following screen:

Submission Successful

Application submitted successfully. You should receive an email confirmation in the next 5-15 minutes. Please email grantadmin@cbtrust.org with any questions. We will contact you if we have any questions.

[Home](#)

You will also receive an email confirming that your application has been submitted. When you return to the Home page, your application will have moved from the Action Items section to the Completed Items section. You will be able to see it under the tab titled “Completed Applications”.

Completed Items

✓ COMPLETED APPLICATIONS (8)

✓ COMPLETED ACTIVITIES (4)

#	Application ID	Application Type	Organization	Project Title	Primary Contact	Amount Requested	Program Area
1	1340 The Environment Method	Grants	The Environment Method	Welcome to SmartSimple!	Carol PhaneufMENV	\$10,000.00	Outreach and Restoration

→ [Open](#)

You can click “open” to view your application. Once it has been submitted, you will no longer be able to make any edits. If you need to make any changes to your application after it has been submitted, please contact Trust staff.