



About me

CEO of Dewlyn Nonprofit Services & CommunityHeroes.us

Board Chair for (CASA) Court Appointed Special Advocates program in GA.

Nonprofit trainer for SCORE chapters and Udemy.com instructor.

Nonprofit consultant and grant-writer.

Author of book: *21 Ways to Fund a Nonprofit.*

Masters Degree in Public Administration.

Member of the American Grant Writers Association.

25 years experience in the nonprofit sector.

Helps over 3,000 nonprofit organizations across the U.S. annually.

C. Smith

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You're in the right place if...

- Emerging
- Newly formed
- Feel like you've missed something
- Opened to learning
- Ready to take action

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Your first 12 months are important.

Let's make certain you have a clear path to success!



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Before we get started...

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Our Discussion

1. Quarterly Planning
2. Annual Compliance
3. Planning & Development
4. Nonprofit Support

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Quarterly Planning

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Year 1 Checklist

Months 1-3

- Board Meetings
- Program Development
- Required Registrations
- Nonprofit Insurance
- Internal Controls



Months 4-6

- Strategic Landscape
- Program Operations
- Income & Sustainability

Months 7-9

- Program Resources
- Program Launch
- Funding Applications
- Professional Development

Months 10 -12

- Organization Evaluation
- Board recruitment
- Prepare new budget

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First 3 months

“Give me six hours to chop down a tree and I will spend the first four sharpening the axe.”
Abraham Lincoln

Laying the Foundation

1. Board Meetings
2. Program Development
3. Required Registrations
4. Nonprofit Insurance
5. Internal Controls

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Newly Formed Nonprofits:

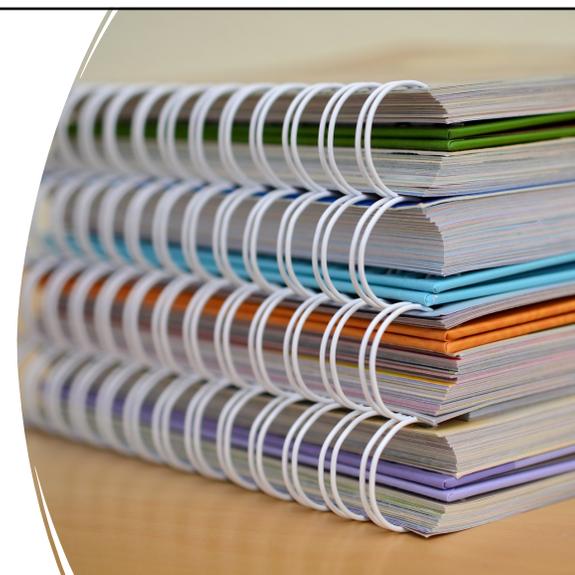
- Common practice to schedule meetings once a month.
- Create your [corporate binder](#) before you hold your first board meeting and update it as you go.

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Prepare for First Board Meeting

Corporate Binder

- Organizing Documents
- Board Agenda & Minutes
- Board Resumes
- Binding Agreements



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Arnold Schwarzenegger
 CA, USA
 88 888
 holtferminator@gmail.com

Personal Statement
 Former body builder and action hero, currently looking for a role /
 double agent for the right pay. Experienced in tracking down all
 from the future and barbarian cult leaders.

Experience
Governor of California, USA
 • Government representative of the Ame
 Passing, repealing and drafting laws
 ated economy of California by s

James Bond
 Intelligence Specialist / Security & Surveillance

EXPERIENCE
British Secret Service, London — Intelligence Oper
 Jan 2001 - Present
 Protecting the UK and her allies from nefarious muslims from
 around the world.
 Liaising with intelligence services around the world including the
 Instrumental in foiling international terror attacks including
 of Fort Knox and the destruction of the world by various means

Royal Navy, Portsmouth, UK — Commander
 Jan 1990 - Dec 2000
 Special intelligence department of Royal Navy, tasked with
 threats to national security.
 In charge of elite unit of highly trained operatives seeing at
 theatres from Russia and Soviet Union, Africa and Middle East

EDUCATION
University of Geneva, Geneva — Masters
 Sept 1985 - Jul 1990
 French and German

Board Resumes

- Chronological style
- White paper
- No photos or artwork necessary
- Plain and boring is best!

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Agreement, or delegate the performance of any of the duties
 the prior written consent of the Commission

SIGNATURE

Always keep copies of any binding agreement that your organization enters.

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Board Meetings



First Meeting

- Elect Directors
- Appoint Officers
- Approve Bylaws
- Adopt a Conflict-of-Interest Policy
- Approve Resolutions (Opening Organization's Bank Account)
- Maybe: Discuss Programs
- Maybe: Discuss Committees

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Committees

Many Different Types

1. Finance Committee
2. Fundraising Committee
3. Governance Committee



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Idea



To do



Doing



Done

Necessary Resources

It is **always** the board's responsibility to ensure adequate financial resources for the organization.

- Identify resources needed
- Establish plan for how these resources will be acquired
- Determine board member involvement

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Program Development

- Corporate presence (address, phone, email, and website)
- Program description(s)
- Create organization and program budget



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Required Registrations

Running your nonprofit corporation legally also means securing all applicable licenses and permits.

- State income & sales tax exemption
- Business license
- Charitable registration



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State Regulations

Annual Registration:

- Due the 4th month after your fiscal year end date.
- Amount: \$20

Charitable Registration:

- Register with the **Division of Charitable Solicitations and Gaming.**
- The fee is \$50 to \$240 depending on gross revenue.
- There is an annual renewal each year which is due on the last day of the 6th month after fiscal year ends.

Exemptions: By type and revenue. Nonprofits that earn less than \$30,000 nationwide per year are exempt.



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Determine Nonprofit Insurance



Nonprofits need protection too!

- General Liability
- Auto Insurance
- Worker's Comp
- Directors and Officers Liability

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Internal Controls

Policies and procedures designed to deter fraud, protect the organization's assets.

Fraudulent Schemes

- Conflicts of interest
- Ghost employees
- Fictitious vendors

Internal Controls

- Risk Assessment
- Segregation of Duties
- Dual Authorization

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Months 4, 5, and 6

“Strategy is a fancy word for coming up with a long-term plan and putting it into action.”
Ellie Pidot

Systems & Strategy

1. Strategic Support
2. Program Operations
3. Income & Sustainability

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Strategic Support

- Community foundations
- Pro Bono Partnerships
- Multi-disciplinary meetings
- Make list of all possible partners
- Enter into MOU and Volunteer agreements



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Program Operations

- Develop org chart
- Develop staff job descriptions
- Develop employee handbook
- Develop program forms



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Income & Sustainability



Developing fundraising plan = Securing revenue from:

- Individuals (fundraising)
- Grants
- Sponsorships
- Fee for Services

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Months 7, 8 and 9

“Well done is better than well said.”
Benjamin Franklin

- Program Resources
- Program Launch
- Funding
- Professional Development

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Program Resources & Launch



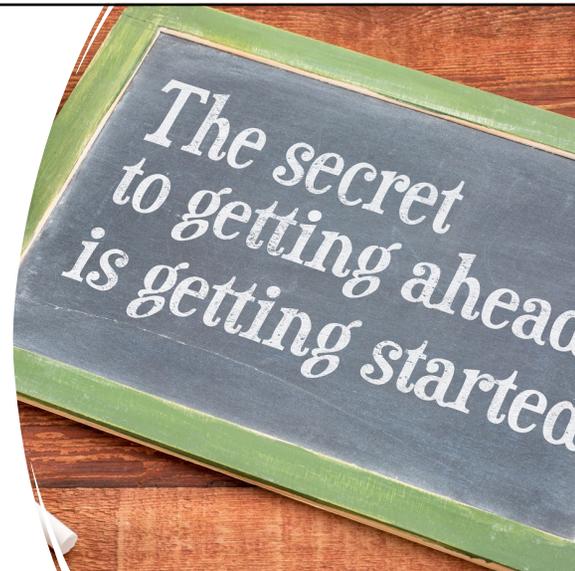
- Leverage partnerships
- Enlist and train volunteers
- Create list of resources and referrals for your constituents
- Begin program!

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Launch Program

Launching program vital for funding!

Think big but start small!



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Funding and Professional Development

- Implement your fundraising plan
- Apply for funding
- Track program activities
- Engage in professional development

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Months 10, 11, and 12

“Sometimes, you have to look back in order to understand the things that lie ahead.”
Yvonne Woon

Assessment Phase

- Organization evaluation
- Board recruitment
- Budgeting

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Organization Evaluation

- Program evaluation
- Board self-assessment
- Board expansion



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Board Recruitment

- Is it time to grow?
- Considerations:
 - Board composition
 - Board involvement



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Your Board of Directors should include:

1. People who bring in money
2. People who monitor the money
3. People who are from the community you serve



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The “Fundraiser”

1. Someone who loves meeting new people!



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The “Analytic”

2. Someone who’s comfortable in business and with finance.



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The “Community Connection”

3. Someone who lives or works in the community you serve.



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Develop Budget

- Budget cycle
- Budget development
- Budget approval



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Annual Compliance

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Compliance

- IRS 990
- Annual Registration Fee to State
- Charitable Registration (annual or bi-annual)
- Business License renewal

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Nonprofit Support

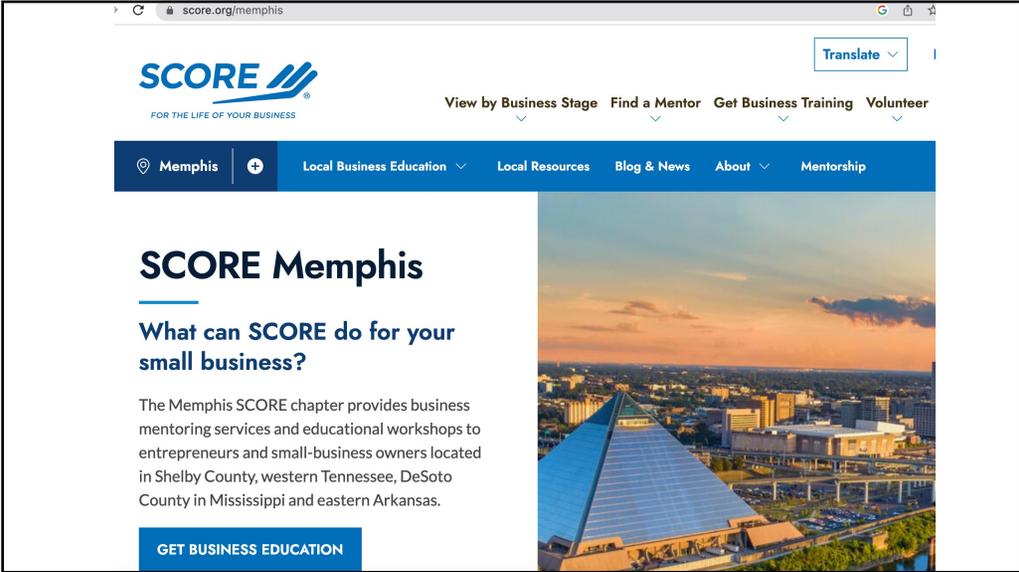
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Nonprofit Support

- **SCORE**
 - Dewlyn Nonprofit Services
 - GOOGLE (UNIVERSITY)
 - IRS “Staying Exempt”
 - Secretary of State
 - National Council of Nonprofits
 - GuideStar
 - Pro Bono Partnership

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score.org/memphis

SCORE
FOR THE LIFE OF YOUR BUSINESS

Translate

View by Business Stage Find a Mentor Get Business Training Volunteer

Memphis Local Business Education Local Resources Blog & News About Mentorship

SCORE Memphis

What can SCORE do for your small business?

The Memphis SCORE chapter provides business mentoring services and educational workshops to entrepreneurs and small-business owners located in Shelby County, western Tennessee, DeSoto County in Mississippi and eastern Arkansas.

GET BUSINESS EDUCATION

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SCORE
FOR THE LIFE OF YOUR BUSINESS

View by Business Stage | Find a Mentor | Get Business Training | Volunteer | About

Memphis | Local Business Education | Local Resources | Blog & News | About | Mentorship

For the Life of Your Business

SCORE Memphis is a group of experienced business professionals who guide those desiring to start up a new small business or assist existing small businesses in improving their profitability.

Our volunteers are experts with experience in areas such as; accounting, finance, human resources, consulting, import/export, law, operations, production, retail, wholesale, manufacturing, sales, marketing, management, business plan preparation, strategic planning, and many other business disciplines.

We provide:

- Volunteer **MENTORS** who share their expertise across many industries
- Free, confidential business mentoring in person, via email or by video
- Free business **TOOLS**, templates, and tips here online
- Inexpensive or free business **WORKSHOPS** (locally) and webinars (online 24/7)

Give Us A Call
(901) 544-3588

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contactus@score.org

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Memphis, TN 38137

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Our Services

1. We establish nonprofit organizations
2. We write grant proposals
3. We provide professional mentoring
4. We provide group coaching and training
5. We provide weekly nonprofit grants
6. We file IRS-990-Ns

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NONPROFIT SERVICES

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