



# Nonprofit Essentials 101: What To Do In Your First 12 Months!

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C. Smith



## About me

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CEO of Dewlyn Nonprofit Services & CommunityHeroes.us	Nonprofit trainer for SCORE chapters.	Udemy.com Instructor.
Nonprofit consultant and grant-writer.	Author of book: <i>21 Ways to Fund a Nonprofit.</i>	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.

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## Thought for the Day

"Great things are not done by impulse, but by a series of small things brought together."

Vincent Van Gogh



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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.

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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



### Months 4-6

- Strategic Planning
- Program Operations
- Income & Sustainability

### Months 7-9

- Program Resources
- Program Launch
- Funding Applications

### 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

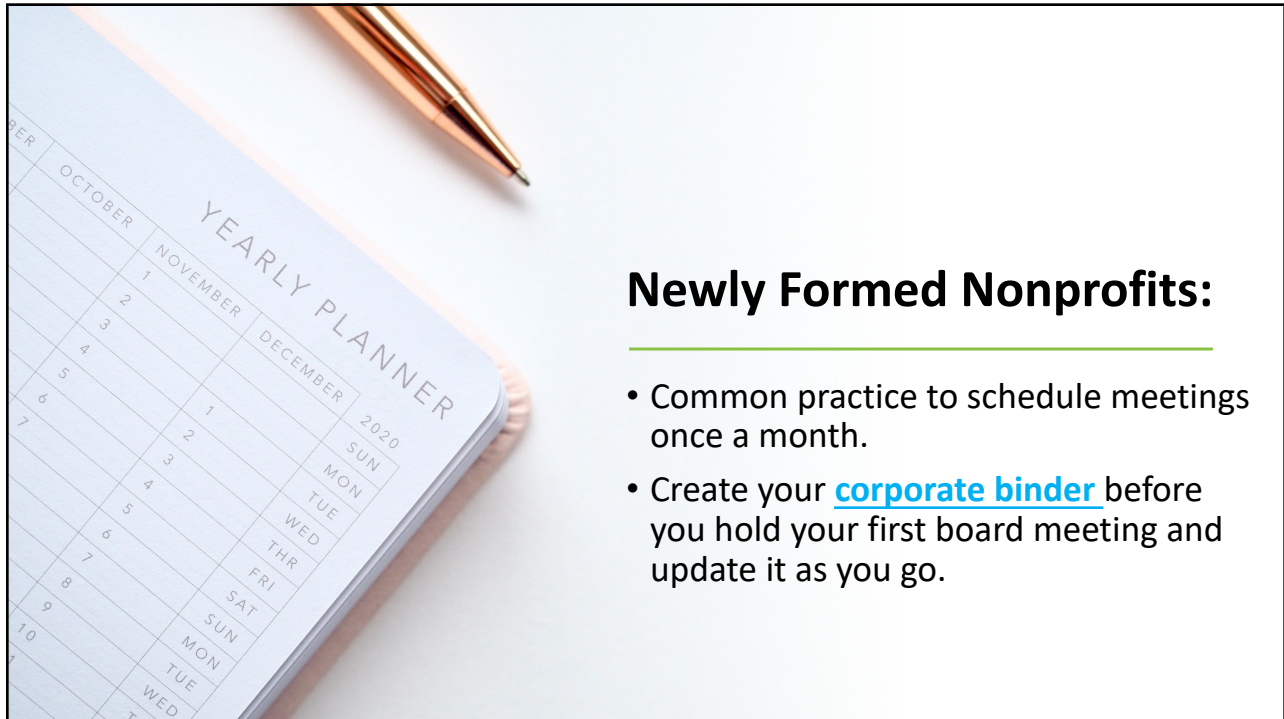
## Laying the Foundation

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

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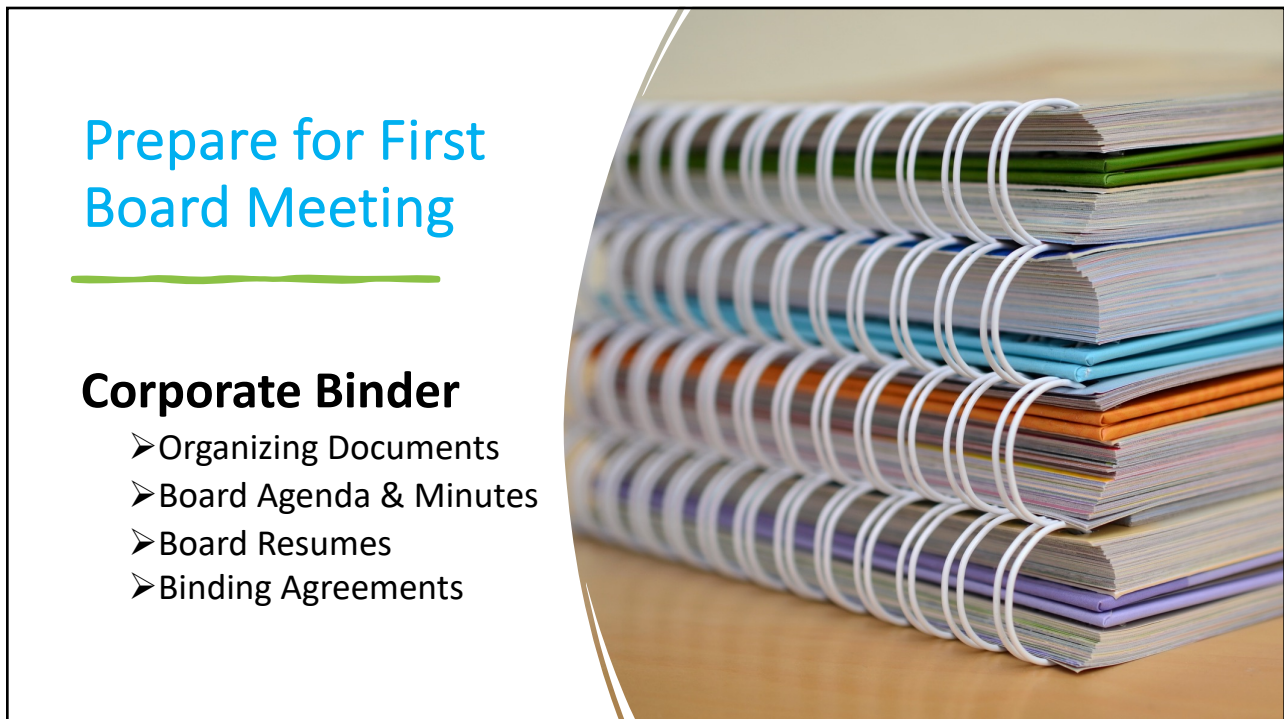


## Newly Formed Nonprofits:

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- 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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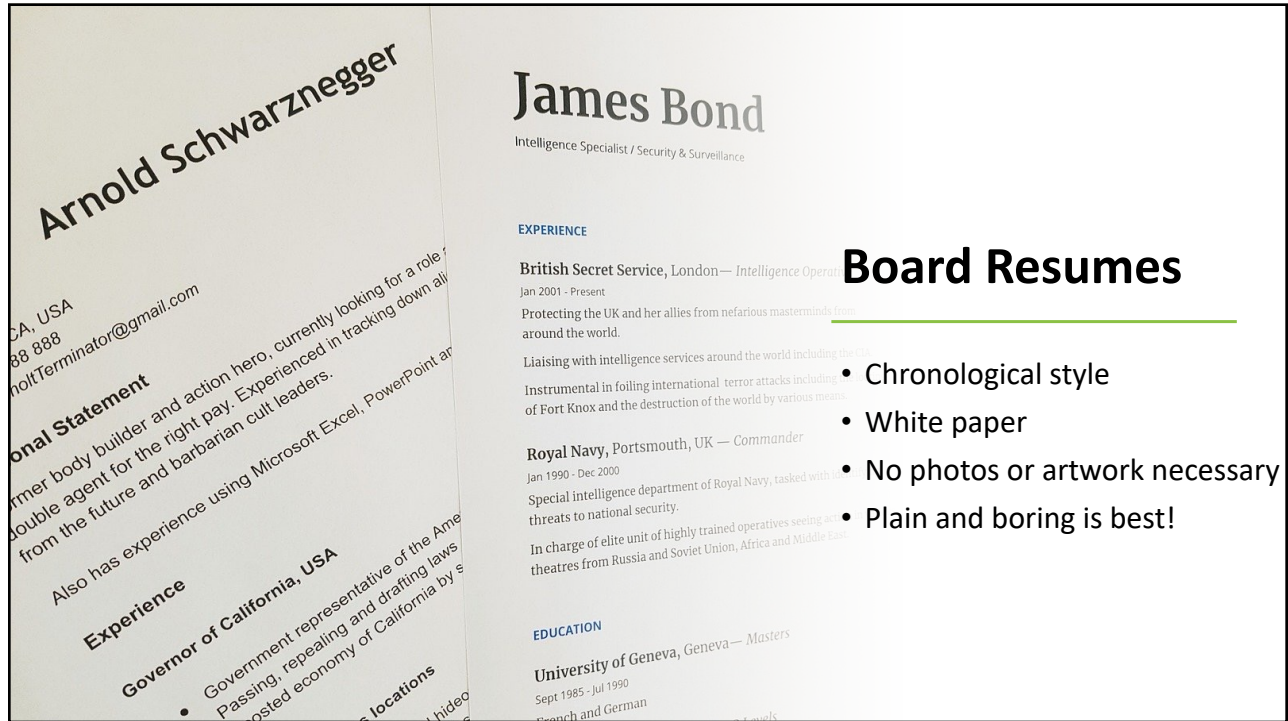
## Prepare for First Board Meeting

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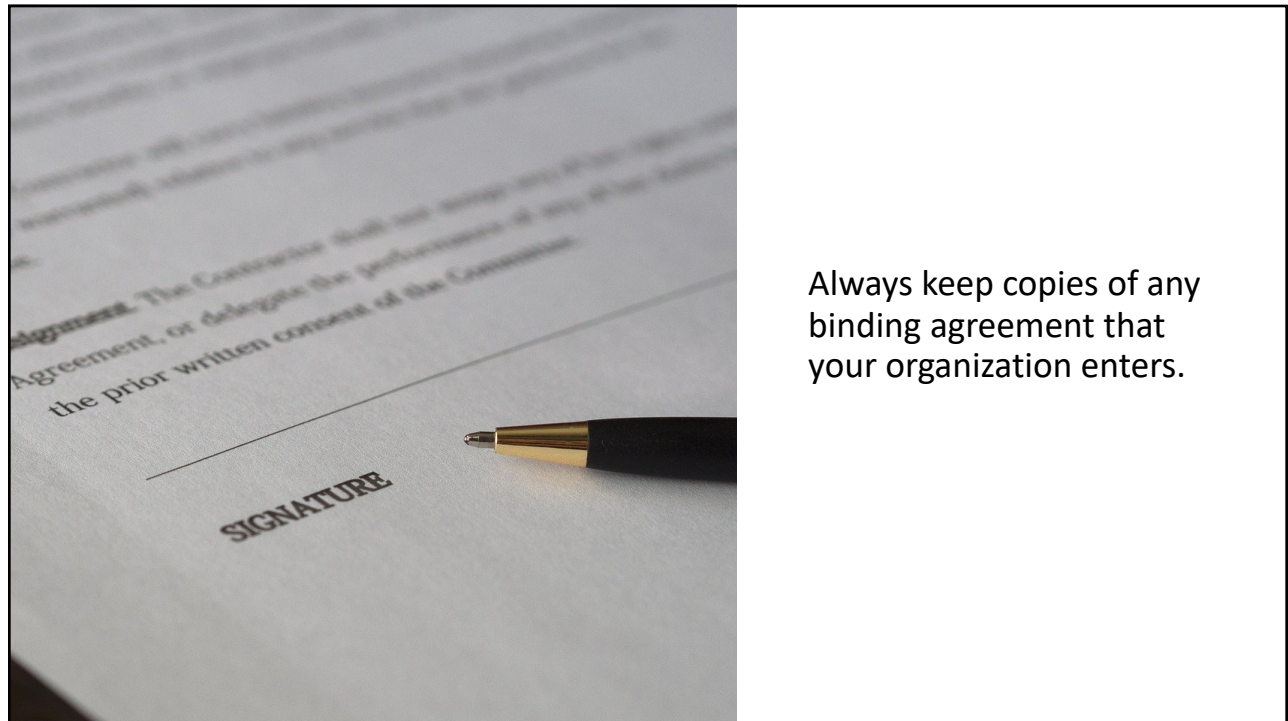
### Corporate Binder

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

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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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## 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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## Determine Nonprofit Insurance

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### Nonprofits need protection too!

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

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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 Planning & Support

- Develop a Strategic Plan.
- Identify Community Partners:
  - Community foundations
  - Pro Bono Partnerships
  - Multi-disciplinary meetings
  - Identify partners
  - Sign MOUs
- Identify Volunteers and secure 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

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**Developing fundraising plan = Securing revenue from:**

- Individuals
- Bequests
- Corporations
- Private Foundations
- Fee for Services
- Fundraisers

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## Months 7, 8 and 9

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

- Program Resources
- Program Launch
- Funding

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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

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- 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

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- Program evaluation
- Board self-assessment
- Board expansion



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## Board Recruitment

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



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## Your Board of Directors should include:

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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”

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1. Someone who loves meeting new people!



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## The “Analytic”

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



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## The “Community Connection”

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



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# Develop Budget

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- Budget cycle
- Budget development
- Budget approval



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# Annual Compliance

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## Compliance

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- 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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## Ending Thought


1 Year =  
365 Opportunities



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[Translate](#)


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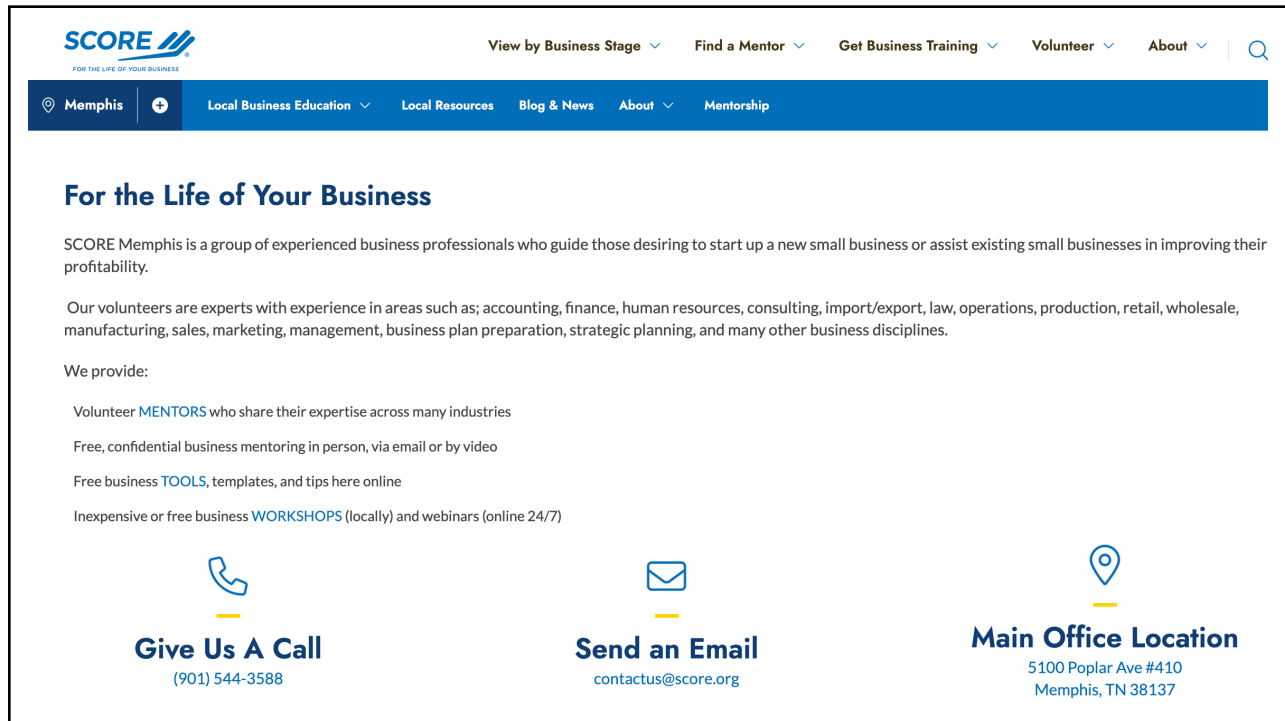
## SCORE Memphis

### 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.



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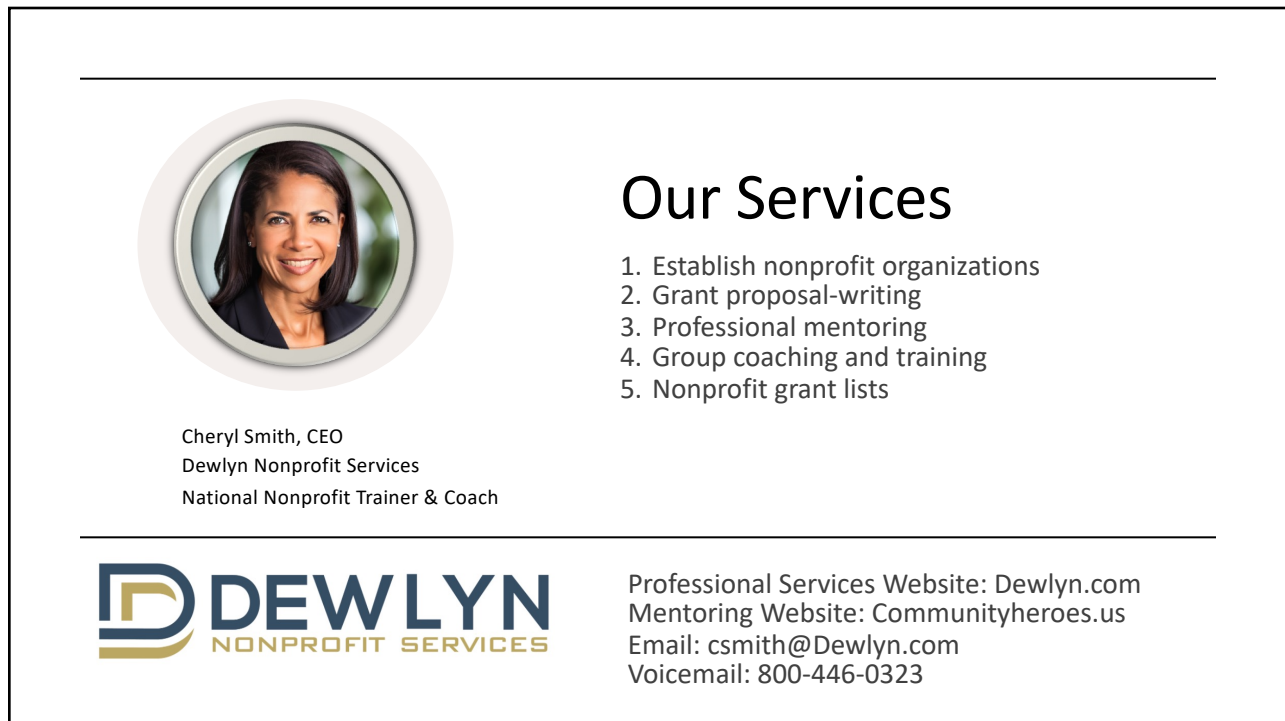



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Cheryl Smith, CEO  
Dewlyn Nonprofit Services  
National Nonprofit Trainer & Coach

## Our Services

1. Establish nonprofit organizations
2. Grant proposal-writing
3. Professional mentoring
4. Group coaching and training
5. Nonprofit grant lists

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Professional Services Website: Dewlyn.com  
Mentoring Website: Communityheroes.us  
Email: csmith@Dewlyn.com  
Voicemail: 800-446-0323

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# Thank You!

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