



NONPROFIT FOR NEWBIES

# Nonprofit Startup Planner

*The official guide to planning your  
nonprofit's success*

---

GIGI LAWRENCE

This planner  
belongs to...

---

**Founder/CEO**

Phase 1:

## **Research and Organize**

SO YOU WANT TO START A  
NONPROFIT....

YOU HAVE A PASSION FOR  
HELPING OTHERS AND A MILLION  
GENIUS IDEAS FOR HOW TO HELP,  
BUT YOU DON'T KNOW WHERE TO  
START...

WELL, THE FIRST STEP IS DOING  
YOUR RESEARCH AND GETTING  
ORGANIZED!



# What really is a nonprofit?

## Let's Get Technical...

In this planner, we are using the term "nonprofit" as another word for 501(c)3.

A "501(c)3 tax exempt corporation" is a public charity that receives special treatment from the government- your organization does not have to pay taxes on most of its income and individuals who make a donation to your organization will receive tax deduction benefits.

This is what will often encourage people to donate money to your nonprofit!

# But in reality...

There may be times when funding is inconsistent

Competition for grants can be tough

You don't own your nonprofit, and important decisions must be made by vote

If you decide to walk away from your nonprofit, you can't take the assets with you . The board must hire someone else to run the nonprofit or dissolve the organization.

-



*You should know...*

## **There are other alternatives to starting a nonprofit**

### **Volunteering**

If you have great ideas you want to share, but don't have the dedication to commit to turning those ideas into action, consider bringing your ideas to an established organization's leaders and offering to help serve the public

### **Fiscal sponsorship**

If you want to provide a service, but not ready to dig deep into the legal matters of starting a nonprofit, consider asking another nonprofit with a similar mission if they have opportunities for mentorship and for you to operate your program under their 501(c)3 status

### **Donor Advised Fund**

If you have the coins but not the time, consider seeking out a community foundation, financial institution, or private charity that offers to assist you with managing and distributing funds for a grant or scholarship

Pros

Cons

**If your still here then you must  
really want to start a nonprofit...**

**Lets get started!**





# Phase 2 :

## Defining Your Purpose

It's time to write down your goals and put together your mission statement!

Your mission statement explains to the public what the purpose of your nonprofit is and defines what goals you want to accomplish.

Let's start by answering a few questions...

**WHY DOES YOUR NONPROFIT EXIST?**

In 1-2 sentences, explain why you want to start a nonprofit.

Example: My nonprofit exists to provide low income mothers with opportunities to succeed.

## WHO WILL YOUR NONPROFIT SERVE?

In 1-2 sentences, describe your ideal client.

Example: I will serve low income mothers between the  
ages of 14-28 and their families

## HOW WILL YOU SERVE THEM?

In 1-2 sentences, describe how you will help your ideal client.

Example: i will provide my client with financial literacy education, basic needs, emergency assistance, and transitional housing.

STORY TIME! WHAT WOULD IT LOOK LIKE WHEN  
YOU ARE DOING YOUR BEST WORK?

In 3-4 sentences tell a success story  
(It's okay to make one up!)

Example: Morgan was 18 years old and struggling financially after having her first child. Through our program, we were able to provide her with free childcare so she could go to work and attend college. At 22. Morgan graduated from Penn State University with a bachelors degree in education, and is now the program director for our after school program.

# WRITING YOUR MISSION STATEMENT IN 4 EASY STEPS

Now that you've brainstormed your ideas and have them organized on paper, it will be easier to create a clear, and concise mission statement.

The first step is to choose a powerful verb (1 word) that best describes the action you will be taking in your community

## 1 TO

---

**Pick an action word:** provide, inspire, eradicate, help, empower, develop, transform, strengthen, motivate, stimulate, organize, revolutionize, promote, prove, enrich, etc

Example: To provide...

Now, you have a few options on how to end your mission statement. You can mention who you serve, the services you provide, what problems you are solving, or what causes you support (or combine these together). Please see the examples on the following page.

2

In a few words, who are you serving? Single mothers, ex-offenders, youth, elderly, disabled, low income families, the homeless, veterans etc.

Example: To provide low income mothers...

3

In a few words, what service are you going to be providing?

Example: To provide low income mothers with financial literacy education

4

In a few words, what is the purpose of your nonprofit?

Example: To provide low income mothers with financial literacy education and ultimately reduce the strain that poverty places on families

# Great Mission Statements

## Inspiration from other Nonprofits

**Bright Pink** helps to save lives from breast and ovarian cancer by empowering women to know their risk and manage their health proactively.

**PCI's** mission is to empower people to enhance health, end hunger and overcome hardship.

**CoachArt** creates a transformative arts and athletics community for families impacted by childhood chronic illness.

**Red My Lips** To transform our culture of sexual violence by educating, inspiring, and mobilizing a global community to red their lips, raise their voices, and create real change.

**First Descents** provides life-changing outdoor adventures for young adults (age 18-39) impacted by cancer.

# My Mission Statement

---

---

---

---





# Phase 3

## Finding The Unmet Need

The most important thing when starting a nonprofit is making sure there is an unmet need in your community . In the business world, this is called a Market Analysis.

FYI You shouldn't skip this part...

The last thing you want to do is start a nonprofit in an over saturated market where there is not much funding available or room for growth . Take your time, do your research, and answer these 4 questions honestly so that you can prepare your organization to be effective.

If after answering these questions you realize that you may be serving a population that already has enough resources available, don't worry . It is not the end.

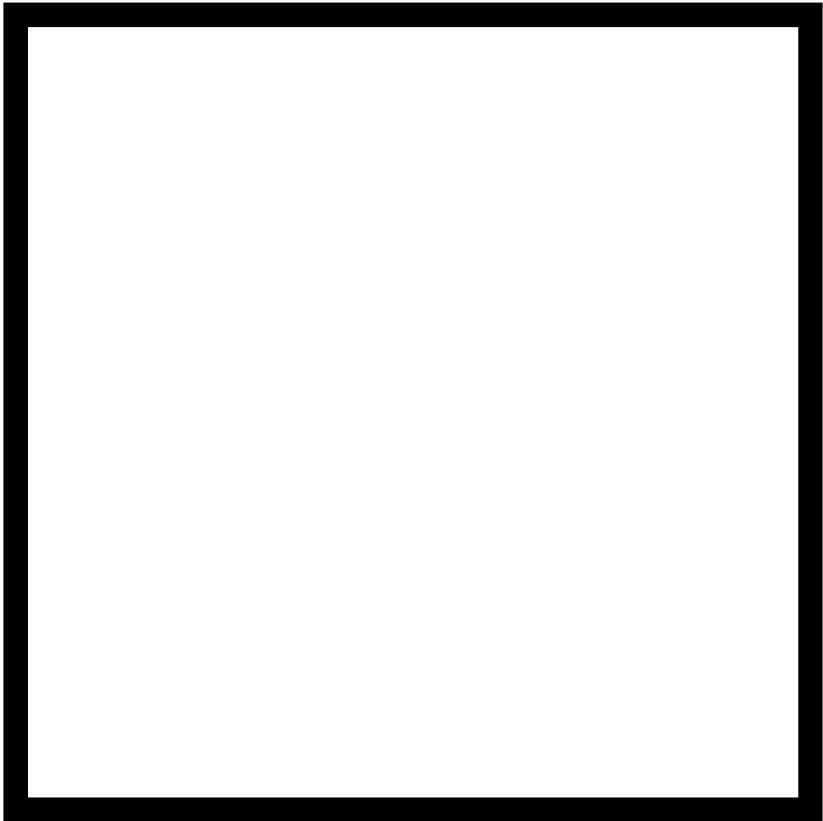
It's time to go back to the drawing board 🖋️📅

And restructure your programs so that you are helping someone  
**IN NEED**

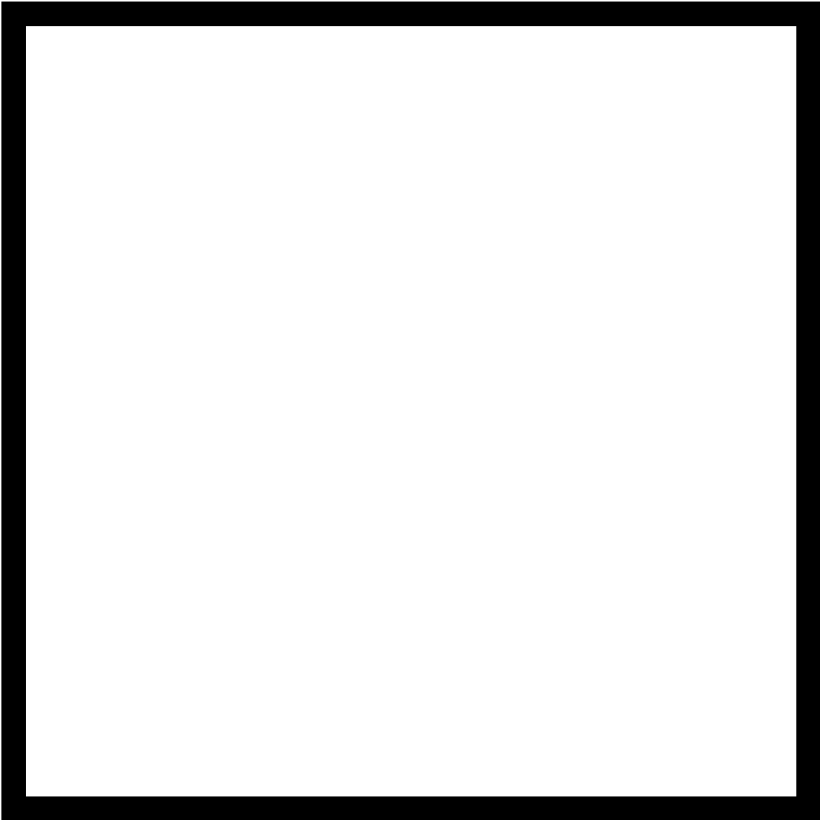
## **Does this community or group have the specific need that you intend to meet?**

Ask the community you intend to serve rather than making assumptions about what you think they need :)

Also contact a local community foundation, United Way, or Chamber of Commerce. They will help you determine the degree of need in the community, the viability of your idea, the types of programs that already exist, and potential level of support (financial and non-financial) that exists

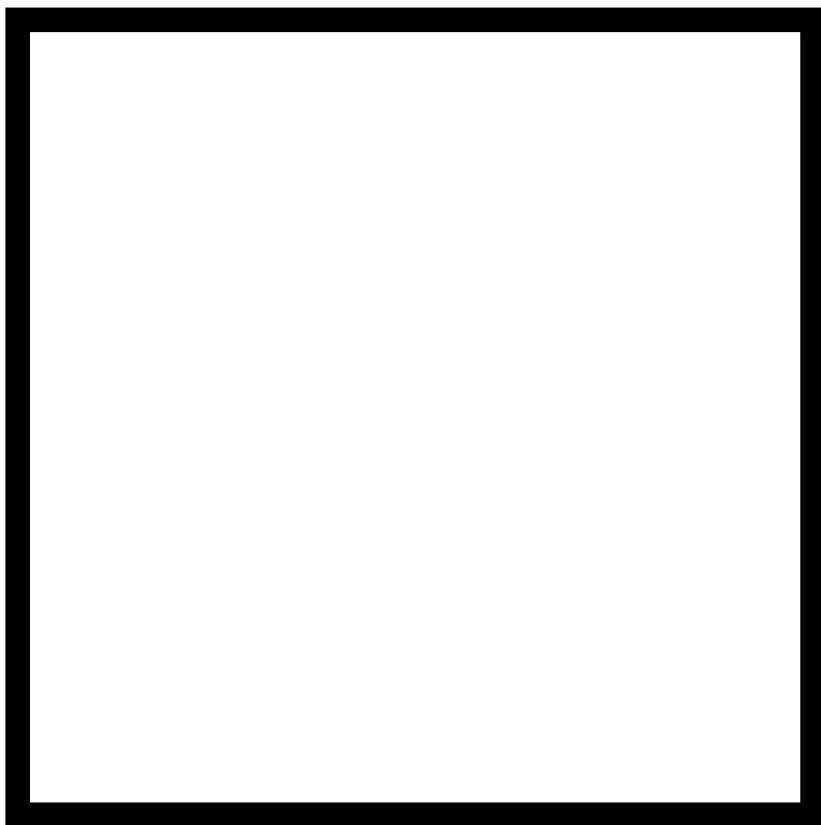


**What competing organizations are already providing the same or similar services to this community or group?**

A large, empty rectangular box with a thick black border, occupying the central portion of the page. It is intended for a handwritten or typed response to the question above it.

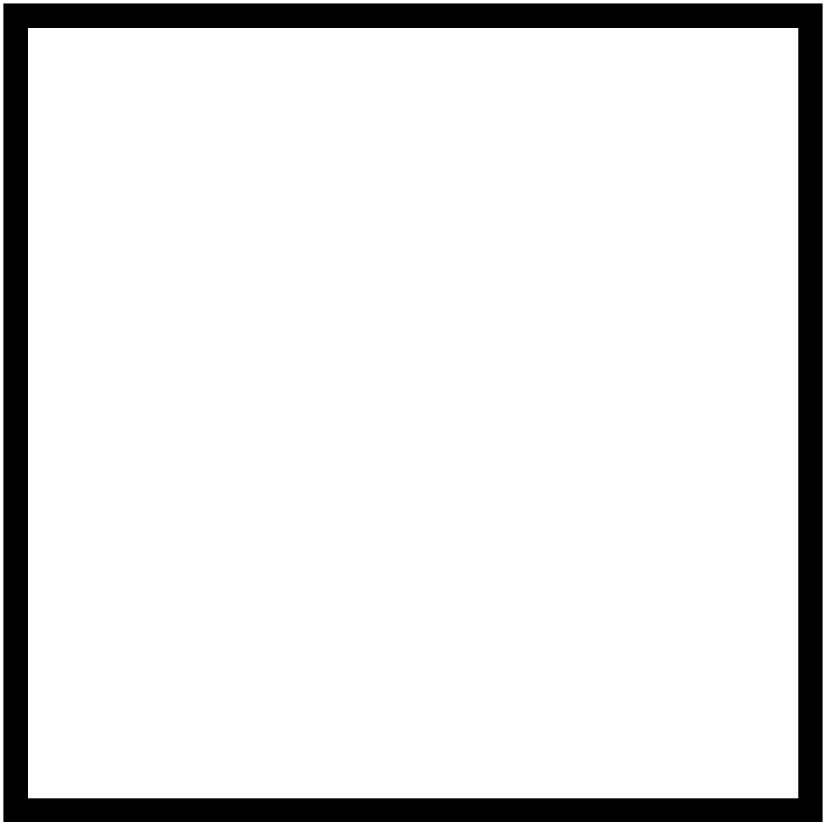
**Is there a strong commitment from the organizers and participants of the organization to build the nonprofit?**

Do you have a team that is willing to build with you?

A large, empty rectangular box with a thick black border, occupying the central portion of the page. It is intended for a user to provide a response to the question above it.

## **Is there an adequate source of funds to support the nonprofit?**

Explore potential funding sources before you go through the time, energy, and expense of starting down the path to incorporation and federal tax-exempt status.



# Phase 4

## Recruit Board Members

A nonprofit doesn't have an "owner" like most for profits do. Your board is a group of individuals who accept responsibility for your nonprofit.

### Responsibilities

**Care** The board must act with caution and show care for the future. They should pay attention and make reasonable decisions.

**Loyalty** They must put the welfare of the organization and its clients first, before considering personal and business interests.

**Obedience** Directors should make decisions based on the nonprofit's mission, bylaws, and goals/vision.

### Quick Tips

#1 You must have at least 3 board directors: a president, treasurer, and secretary

#2 Your board members should be unrelated (this includes business and familial relationships!)

#3 Directors are volunteer positions and the individual chosen should be committed to the mission you as the Founder has for the nonprofit

# Board President

President is the chief volunteer representative of the nonprofit. She will work closely with the CEO to ensure communication between the staff and board.

Who do you have in mind?

---

---

---

---

*Notes*



# Board Secretary

Secretary is the official keeper of the organizational records and will record all of the decisions made during board meetings.

Who do you have in mind?

---

---

---

---

*Notes*





# Board Treasurer

Treasurer works closely with the CEO to report summaries of the nonprofit's finances to the board. She will also help set up the organization's budget. oversee accounting systems, and monitor all tax related paperwork (such as the form 990)

Who do you have in mind?

---

---

---

---

*Notes*



# Phase 5

## **Organizational Planning**

Planning includes deciding where to go and how to get there. Start by reviewing your mission statement and what problem you are trying to solve. What programs/services will solve that problem?

You should start with 3 programs for your ideal client

For most nonprofits. the initial programs should include:

**Basic Needs**  
**Workforce Development**  
**Mentorship Program**

# Develop Programs

## BRAINSTORM: PROGRAM FOR BASIC NEEDS

Example: Food Pantry, Toiletries, Identification and Birth Certificate, Housing Assistance

Description

---

---

Goals

---

---

How to achieve goals

---

---

# Develop Programs

## BRAINSTORM: WORKFORCE DEVELOPMENT

Example: Resume Assistance, Mock Interviews,  
Tuition Assistance, Transportation

Description

---

---

Goals

---

---

How to achieve goals

---

---

# Develop Programs

## BRAINSTORM: WORKFORCE DEVELOPMENT

Example: Resume Assistance, Mock Interviews,  
Tuition Assistance, Transportation

Description

---

---

Goals

---

---

How to achieve goals

---

---

# Develop Programs

## BRAINSTORM: MENTORSHIP

Example: Big Brother Program, 6 Week Bugdeting and Credit Building Program, Youth Entrepreneurship

Description

---

---

Goals

---

---

How to achieve goals

---

---

# Develop Programs

## BRAINSTORM: OTHER IDEAS

Description

---

---

Goals

---

---

How to achieve goals

---

---

# SMART Goal

**SMART Goals consist of 5 requirements- they must be specific, measurable, achievable, relevant and time-bound**

What is the goal you have in mind?

---

---

---

---



## **Specific:**

Who needs to be involved to achieve the goal?

What do you want to accomplish? (Get detailed!)

When do you want to accomplish this?

Where? Is there a relevant location?

Is your goal realistic? What are the obstacles and requirements?

Why is this a goal? What is the reason?

---

---

---

---

---

---

---

## **Measurable:**

What statistics can you use to measure your achievement?

Can you break your goal into easier to complete milestones?

---

---

---

---

---

---

---

## **Achievable:**

What do you need to do to make your goal achievable?  
What are the resources and skills needed? If you don't  
have access to some of these resources, how can you  
gain access?

---

---

---

---

---

---

---

## **Relevant:**

Is your goal relevant to the mission of your organization? How?

---

---

---

---

---

---

---

## **Time Bound:**

What are your milestone deadlines and what can be accomplished before each deadline?

---

---

---

---

---

---

---

# SOAR Analysis

SOAR Analysis is a strategic planning tool to help your organization construct its future

\*Review Market Analysis done in phase 2- will be helpful for SOAR Analysis\*

## S TRENGTHS

### **Inquire on strengths**

- What makes us unique?
- How do our strengths fit with the realities of the market?
- What are we most proud of as an organization?

## O PPORTUNITIES

### **Imagine Opportunities**

- Are there any gaps in our existing market?
- Do our clients have unfulfilled needs that we can meet?
- Are there any new markets we should enter?

## A SPIRATIONS

### **Aspire to Succeed**

- What should our nonprofit look like in the future?
- What are we passionate about?
- How can we make a difference?

## R ESULTS

### **Implement to Achieve Results**

- What statistics can we use to measure our achievements?
- What resources are needed to implement necessary programs?
- Can we translate our aspirations into a measurable goal?

# SOAR Analysis

## YOUR SOAR ANALYSIS

S

TRENGTHS

O

PPORTUNITIES

A

SPIRATIONS

R

ESULTS

# Synopsis

## Executive Summary

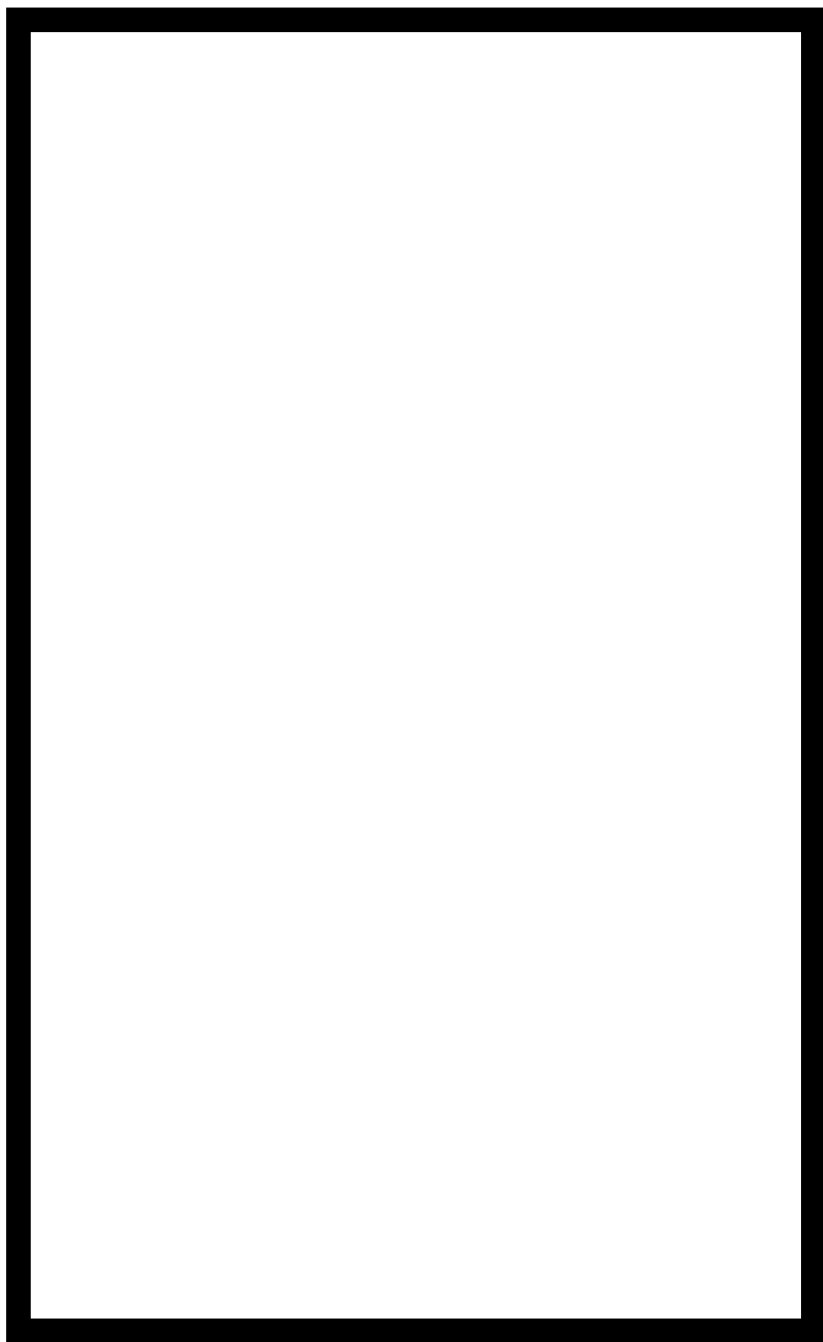
Summarize your mission, programs, goals, and analysis  
of goals

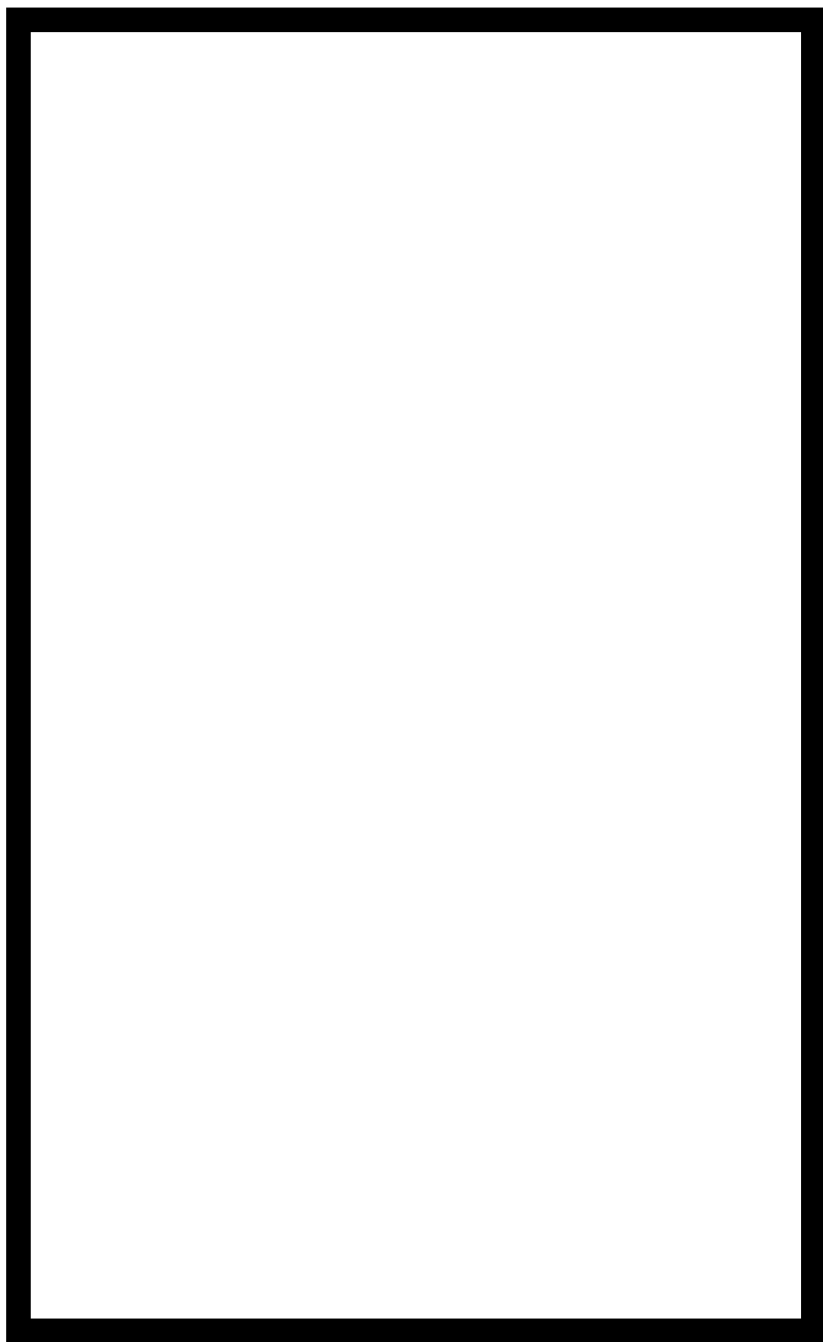
Match your story and use language for your intended  
audience  
(client, donor, or volunteer)

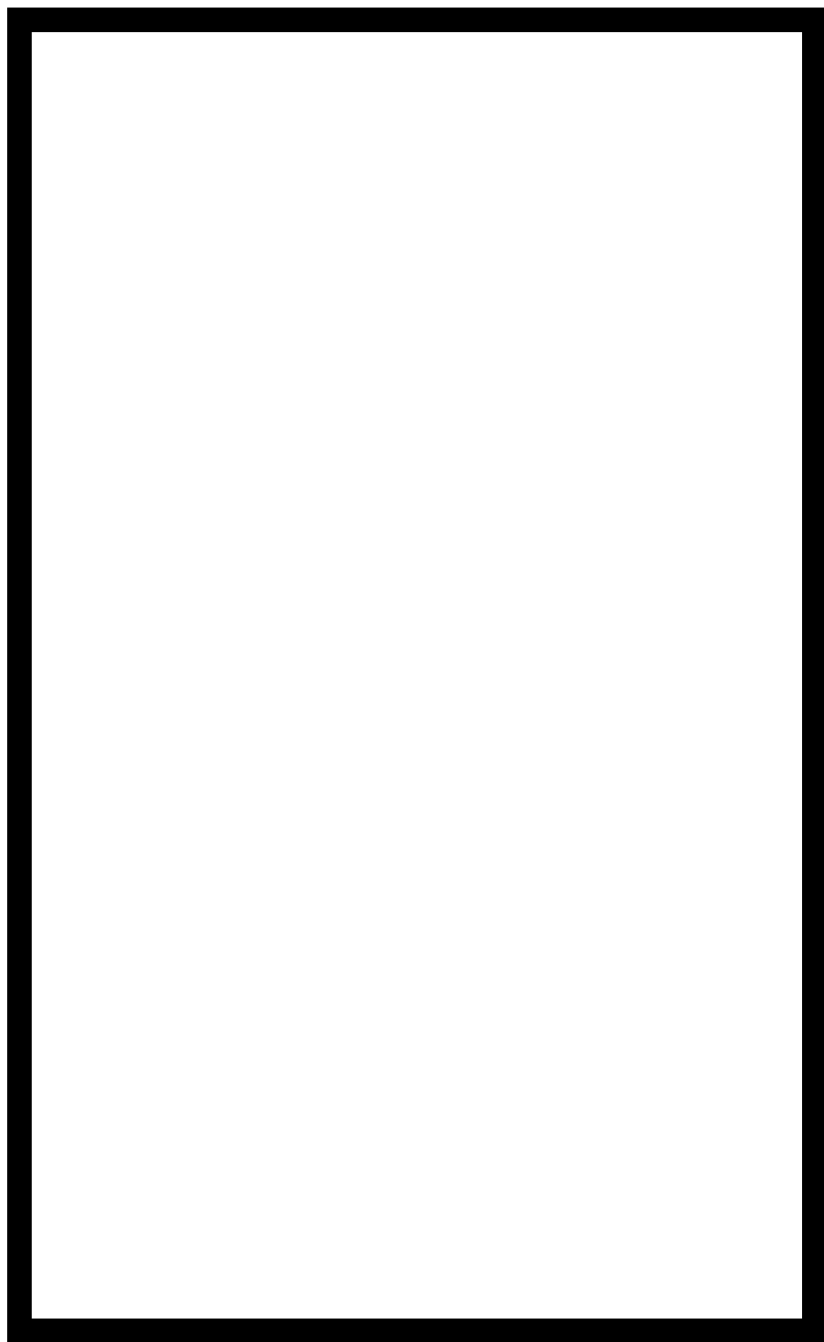
First paragraph: Start with a hook \*an attention  
grabber\* to explain what you do. Tell a story, a joke,  
explain a vision, or share an aha! moment

Second paragraph: What makes your nonprofit  
unique and exciting? Briefly list your programs in  
bullet points









# Start your Nonprofit

Now that you have a clear and concise plan for your nonprofit it's time to get started!



Choose a name



File articles of incorporation with your state



Draft Bylaws and Conflict of Interest Policy



Apply for federal taxpayer identification number (EIN)



Complete Application for 501(c)3 status

Visit [www.NonprofitForNewbies.com](http://www.NonprofitForNewbies.com) to start your nonprofit today!