LOS ANGELES COUNTY JUSTICE CARE AND OPPORTUNITIES DEPARTMENT

NONPROFIT FOUNDATIONS TOOLKIT

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Welcome to the Nonprofit Foundations Toolkit

Your Guide to Building with Purpose and Impact

Starting a nonprofit organization is more than an idea—it is an act of service, courage, and commitment to your community. We recognize and deeply appreciate your dedication to creating positive change, and we are honored to support you on this journey.

This Toolkit was designed to serve as both a practical resource and a guiding companion as you take the first steps toward establishing your nonprofit. Inside, you will find essential tools, templates, and guidance to help you:

- Navigate the 501(c)(3) formation process with confidence.
- Draft bylaws and articles of incorporation that reflect your mission and values.
- Craft a clear and inspiring mission and vision statement.
- Strengthen leadership through board development checklists.
- Build a strong foundation for sustainability with budget and fundraising starter templates.

At every stage of your journey, this Toolkit is here to help you clarify your purpose, structure your vision, and position your organization to thrive and build a foundation for lasting success. We hope it serves as a steady, supportive resource as you transform your passion into purpose—and your purpose into meaningful community impact.

In partnership,
Los Angeles County Justice, Care and Opportunities Department (JCOD)

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What is a Nonprofit Organization?

"A nonprofit's profit is purpose."

A nonprofit organization is a mission- driven entity created to serve the public good rather than to generate profit for owners or shareholders. Any income earned supports the organization's programs, services, and community impact.

Nonprofit organizations address a wide range of social issues — from education, youth development, and housing to arts, health, and justice. Most operate as 501(c)(3) public benefit corporations, recognized by the IRS as tax-exempt because their purpose is charitable, educational, scientific, or community-serving.

To maintain this status, nonprofits must do these top 3 things:

01

Operate with Transparency and Public Accountability

Be open about how your organization works and spends its money. Share updates with your community, involve your board in decisions, and make your reports and results easy to access. Transparency builds trust — and keeps you compliant.

02

Reinvest All Funds Back into Your Mission

Every dollar your organization receives should go toward your programs, services, and the people you serve — not personal profit. Reinvesting in your mission strengthens your impact and shows funders you're focused on community change.

03

File Your Annual Paperwork on Time

Stay in good standing by turning in your IRS Form 990 and state filings every year. Missing filings can cause your nonprofit to lose its tax-exempt status. Keep track of deadlines or get help from someone familiar with nonprofit compliance.

What is a Nonprofit Organization?

Types of Nonprofits

Nonprofits can take many forms, depending on their mission and structure. Understanding these distinctions helps ensure you choose the right path for your vision. They can take the form of a corporation, unincorporated association, partnership, foundation, or other entity. Some examples and their descriptions are listed below:

Public Charities (501(c)(3))

1

The most common type of nonprofit — focused on serving the public through programs in education, youth development, housing, health, arts, and justice. Public charities rely on donations, grants, and volunteers, and must reinvest all funds back into their mission.

Private Foundations

2

Usually started by individuals, families, or businesses to support other organizations doing community work. They often provide grants or funding rather than running their own programs.

Faith-Based Organizations

3

Rooted in spiritual or religious missions, these nonprofits serve communities through programs like food assistance, mentoring, shelter, recovery, or education. They can qualify as 501(c)(3)s as long as they serve the public and not just members of their faith community.

Social Welfare Organizations (501(c)(4))

4

Focus on community advocacy and public policy. These nonprofits can engage more in organizing, education, and advocacy for social change, but donations are not tax-deductible like 501(c)(3)s.

Unincorporated Associations and Community Groups

5

Informal community groups that work together for a cause without formally incorporating. Great for starting small and testing ideas, but they don't offer legal protection or access to large grants until officially registered.

Nonprofit Corporations

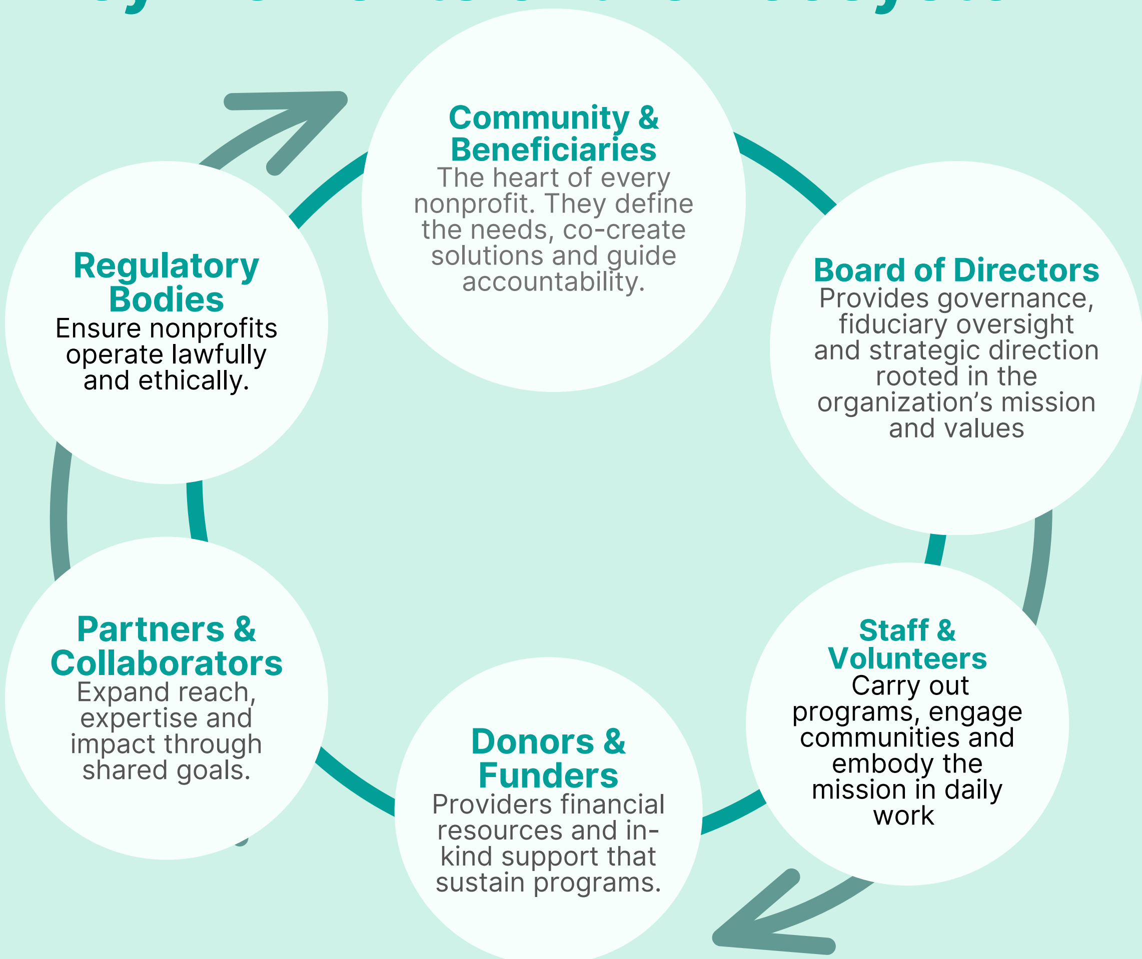
6

Legally registered organizations that operate with state and IRS recognition. This structure offers protection for board members and staff, makes fundraising easier, and supports long-term sustainability and growth.

The Nonprofit Ecosystem

"When every part of the ecosystem is aligned, impact becomes inevitable."

Key Elements of the Ecosystem



A successful nonprofit doesn't exist in isolation — it operates within a living **ecosystem of people, partners, and systems** that sustain its mission.

Understanding how these parts connect helps your organization **build balance, accountability, and shared power.**

"Collaboration is the currency of impact."

Ecosystems Reflection Worksheet

Use this worksheet to map the key people, partners, and systems that make your organization thrive. Think about *who supports your mission, how they contribute, and what relationships could be strengthened*.

Ecosystem Role	Who Are They? (Names or Groups)	How Do They Support or Connect?	Opportunities to Strengthen Connection
Community/ Beneficiaries			
Board of Directors			
Staff & Volunteers			
Donors/Funders			
Collaborating Partners			
Regulatory/ Oversight Bodies			
Other Key Stakeholders			

Reflection Prompts:

- Which relationships are the strongest?
- Which ones need more trust, communication, or clarity?
- How can your nonprofit better include the voices of those you serve in decision-making?

Start Your Nonprofit in **10 Key Steps**

"Start small, stay grounded, and grow with purpose."

01

Define Your Purpose

Clarify your mission, vision, and values with community input.

02

Check Readiness

Complete your readiness self-assessment and confirm your core team.

03

Name & Incorporate

Choose your nonprofit name, file Articles of Incorporation with the California Secretary of State.

04

Build Your Board

Recruit at least three committed directors; adopt bylaws and hold your first board meeting.

05

Get an EIN

Apply at IRS.gov for your Employer Identification Number (EIN).

06

Apply for 501(c)(3)Status

Submit IRS Form 1023 or 1023-EZ for federal tax exemption.

07

Register with California Agencies

Items to file:
a. CT-1 (Attorney General)
b. Form 3500A or 3500 (Franchise Tax Board)
c. SI-100 (Secretary of State)

08

Create Policies & Budgets

Adopt internalpolicies, build your first-year budget, and set up financialsystems.

09

Develop Programs & Partnerships

Start small, collaborate with others, and measure early impact.

10

Stay Compliant & Keep Growing

File annual reports (IRS 990, CA RRF-1, FTB 199).

Reflect, celebrate, and plan for sustainability!

Mission and Vision Development

Mission and Vision: Your Nonprofit's Compass

Start with Your "Why" (The Mission)

Every successful nonprofit begins with a clear sense of why — the reason your organization exists. Your mission explains what you do, who you serve, and how you create change in your community. It's the heartbeat of your organization.

A strong mission statement helps you stay focused when challenges come up and reminds others why your work matters.

Example:
Our mission is to empower young people in underserved neighborhoods through mentorship, education, and career opportunities.

Paint the Picture of What's Possible (The Vision)

Your vision describes the world you're working toward — the bigger dream that guides your long-term goals. It's not about what you're doing today, but what your efforts will make possible in the future.

A powerful vision inspires hope and brings people together around shared possibilities.

Example:
Our vision is a world where every young person has access to opportunity, confidence, and support to reach their full potential.

Your Mission and Vision Work Together

Together, your mission and vision serve as your organization's compass — guiding every decision, partnership, and program you create. They keep your work grounded in purpose and help others see the

Mission & Vision Statement Overview

Your mission statement defines the core purpose of your organization — the reason you exist and the impact you aim to create.

It should be clear, memorable, and rooted in action.

Use this worksheet to craft a mission statement that communicates what you do, who you serve, and why it matters.

Keep it simple, powerful, and authentic to your story.

Tip: A strong mission inspires connection — it tells people why your work matters and invites them to join you.

Your vision statement describes the future you are working to create — the world that becomes possiblebecause your mission succeeds.

It should be bold,inspiring, and easy to picture.

Tip: A powerful vision paints a picture of hope — it shows others what “success” looks like when your mission is fulfilled.

Alignment

Your mission and vision work best when they move togehter — one describing what you do everyday, the other showing where that work leads.

Your mission tells the story of today — your vision imagines the promise of tomorrow.

Mission/Vision Statement Guidelines

Mission Statement Definition

A one-sentence statement describing the reason your organization or program exists. (what you do+ who/what you do this for)

Primary Audiences & Functions of a Mission Statement

JCOD INCUBATION ACADEMY – NONPROFIT FOUNDATIONS TOOLKIT

External

Inform Others of What You Do

Your mission statement is a great way to summarize what your org is about, providing context for follow up information on programs and services.

Staff & Volunteers

Focus & Motivate Your Team

People want to believe in the work they do. Your mission statement should be easy for staff & volunteers to understand, remember, and own.

Leadership

Guide Strategic Planning & Decisions

By definition, you cannot prioritize everything. Your mission statement should serve as your guiding star when considering priorities and new initiatives.

Guidelines Your Mission Statement Should Follow

Clear

(Easy to Understand)

This is not a time to show off your vocabulary. Use concrete language and keep things simple. Try to keep to an 8thgradereading level, don't exceed 10th grade.

Concise

(Short & To-the-Point)

Don't fall prey to buzzwords, adjective strings and fluff. Aim for 5-14 words, 20 max. This is oftenthe hardest part,but anything longerand you undermine its utility.

Useful

(Inform. Focus. Guide.)

It doesn't matter how short, clear or cute your phrase is if it fails to inform others about what you do and focus and guide internalteam members and decisions.

Mission Building Blocks & Frameworks

Rather than starting with an unstructured brainstorming session, we find it helps to take a step back and start with a different mission statement building blocks and frameworks.

The Simplest Approach

The most straight forward approach is to pair high-level actions with a targeted beneficiary.

Action(s) **Targeted Beneficiaries**

The protection of all native animals and plants in their natural communities – Defenders of Wildlife
To serve individuals and families in the poorest communities in the world – CARE
Lift the spirits of America's troops and their families – USO
To inspire and empower people affectedby cancer – Livestrong

Examples of Alternate Frameworks

In addition to actions and targeted beneficiaries, some other possible building blocks include services, partners, causes, and problems. In order to keep things clear and concise, we recommend not exceeding more than 4 or 5 building blocks and no more than one word string (e.g. inspire and empower...OR...poverty, hunger, and social injustice).

Action(s) **Service(s)** **Targeted Beneficiaries**

Bringing clean, safe drinking water to people in developing countries – charity: water

Action(s) **Service(s)** **Problem(s)**

To create lasting solutions to poverty, hunger, and social injustice – Oxfam

Action(s) **Beneficiaries** **Service(s)** **Action(s)** **Problems**

To connect people through lending to alleviate poverty – Kiva

Action(s) **Beneficiaries** **Action(s)** **Problems**

Celebrating animals and confronting cruelty – The Humane Society

Action(s) **Beneficiaries** **Cause**

Working to achieve lesbian, gay, bisexual and transgender equality – Human Rights Campaign

Action(s) **Cause** **Beneficiaries**

To inspire conservation of the oceans – Monterey Bay Aquarium

One-Page Missions Statement Worksheet

Guidelines for selecting and completing each building block

- Choose 2-4 building blocks.5 max.
- 5-14 words total. 20 max.
- 1 word string(A, B, & C). Choosewisely.
- 8th grade reading level. 10th grade max.
- Target < 20 syllables total. 30 max.
- Avoid long or complicated words

***Action(s)** **High level action verb(s) to kick things off. "To .... "**

List options. Circle your top 1 or 2.

***Targeted Beneficiaries** **The who/what that benefits from your work the most.**

Super-Short Version (1-3 words)

Somewhat Short Version(4-8 words)

Service(s) **What service(s)do you provide?**

Problem(s) **What problems does your productsor services solve?**

Cause **Is there an overarching cause you support?**

Partners **Are there any non-standard partners that are critical to your model?**

* Indicates strongly recommended. All others optional.

Now on a separatepiece of paperor whiteboard, stringselected blocks into a draftmission statement. Continue refining and compressing until the result fits within guidelines.

One-Page Missions Statement Worksheet

Vision Statement Definition

A short phrase describing the future you are ultimately working towards (i.e. your final destination or desired end state)

How A Vision Statement Differs From A Mission Statement.

Mission statements and vision statements are complementary but unique.

Mission

- Present tense
- Describes what you do and who/what benefits from this work

Vision

- Future Objective
- Description of a future you are ultimately working towards

MISSION: To create lasting solutions to poverty, hunger, and social injustice.
VISION: A just world without poverty.

Guidelines Your Vision Statement Should Follow

Clear (Easy to Understand)

- [ ] Simple and concrete language
- [ ] 8^{th} grade readinglevel. 10^{th} max
- [ ] Avoid buzzwords and jargon

Concise (Sort & to the Point)

- [ ] 5-14 words (20 max)
- [ ] Avoid words > 12 letters or 4 syllables
- [ ] No more than 1 word string (A, B, and C)

Brainstorming Questions

What problems does your products or services solve?

If you were completely successful, what would this look like for you and your customers?

(Rare) Do you want to self impose a timeline? (Good for urgency. Awkward if not achieved.

Readiness Self-Assessment

"Readiness isn't about perfection — it's about building from a place of purpose and preparedness."

Before filing for 501(c)(3) status, it's important to pause and take stock of your **organization's readiness**. Is this the right decision at this time? Not now doesn't mean not ever.

This reflection helps you **identify strengths, gaps, and areas where you may need more time,** partners, or planning support.

Use the Readiness Self- Assessment Worksheet to **evaluate your clarity of purpose**, leadership capacity, governance structure, and financial preparedness.

Think of it as a check-in, not a test rather a chance to **ensure your foundation is strong** before taking the next step.

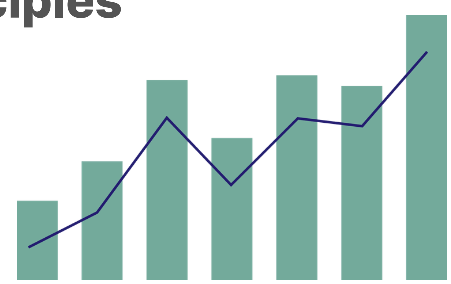
How to Use this Readiness Tool

Use this worksheet as a roadmap for your nonprofit's launch journey. It's designed to spark reflection and help you plan your next steps with confidence. Assessing readiness is a fluid process---take your time, be patient, and continue to reflect on the here and now regarding your preparedness for starting a nonprofit organization.

Core Principles

Be Honest

This tool is for your growth – not for grading. Check only what's true today.



Track Progress

Revisit the checklist every 3–6 months to measure how your organization is growing.

Identify Gaps

Use the Notes column to capture what support or resources you might need.

Ask for Help

Share your results with mentors' staff, or board members to plan your next move.

Tip:

Progress over perfection — every box you check brings your mission closer to reality.

Readiness Self-Assessment

Category	Readiness Indicator	✓	Notes / Next Steps
Mission Clarity and Conciseness	I can clearly state our mission in one sentence.	☐	
Mission/Community Need Alignment	Our mission addresses a verified community need.	☐	
Community Engagement	We have engaged community voices in defining our purpose.	☐	
Leadership & Governance	We have at least three committed board members.	☐	

Community Assessment

Before filing for 501(c)(3)status, it's important to **understand the community** you hope to serve.

A **community assessment** helps you ground your mission in real needs, existing strengths, and authentic relationships — not assumptions.

Completing this step early ensures your nonprofit:

- ·Aligns with what the community truly needs and values.
- ·Builds trust and collaboration with partners from the start.
- ·Avoids duplicating services already in place.
- ·Strengthens your IRS 1023 application and future grant proposals.

You don't need a full research project before filing – just a baseline scan of who you serve, what gaps exist, and how your work adds value.

Listening first helps you build a mission that reflects the community's voice and vision

"A mission rooted in listening grows into lasting impact."

Community Assessment Worksheet

A strong nonprofit begins with a deep understanding of the community it serves. A community assessment helps you listen, learn, and ground your mission in real needs,assets, and voices. It's not just about identifying gaps — it's about recognizing existing strengths, partnerships, and opportunities for collaboration.

Use this worksheet to explore who your community is, what resources already exist, and where your organization can add the most value.

Section 1: Understanding Your Community

Use this section to describe the people, places,and priorities that define your community

Assessment Area	Notes / Observations
Community demographics (age, race, income, geography) Languages and cultures represented	
Key challenges or needs identified by residents	
Community assets and strengths	
Existing organizations or networks serving this area	

Section 2: Community Needs & Opportunities

Identify areas where your nonprofit's missioncan create meaningful impact or fill service gaps.

Identified Need or Issue	Existing Responses or Programs	Potential Role for Your Organization

Community Assessment Worksheet

Section 3: Community Partners& Collaborators

List potential collaborators who share your goals or serve similar populations.

Partner Organization / Contact	Role or Focus Area	Current Relationship (Strong/ Moderate/ Emerging)	Next Step for Collaboration

Section 4: Reflections

- What strengths and opportunities stand out in your community?
- How do your mission and programs align with existing efforts?
- What voices or perspectives need to be more involvedin your planning?
- What immediate next stepswill you take to deepen community engagement?

Legal Formation
(California Focus)

“Structure protects purpose — a solid foundation allows your mission to grow.”

Forming a nonprofit in California is the process of turning your vision into a legal entity — one that can open a bank account, apply for grants,hire staff, and operate with transparency and accountability.

This section walks you through each step of the California nonprofit formation process, from filing your Articles of Incorporation to securing your federal and state tax exemptions.

Each action helpsyou build a strong and compliant foundation that supports your mission and protects your organization.

While the steps may seem technical, they are also part of establishing your nonprofit’s integrity and trust with the community, funders, and public partners.

A Step-By-Step Guide to Starting a Nonprofit Organization in California

01 Determine your Purpose and Mission to Serve

- Reflect on your Purpose, Core Values, and Desired Impact: What problem are you trying to solve or what need are you addressing? Define what principles and desired impact that will guide your service.

- Identify your Service Community and Focus: Who are you serving and how will you serve them? Engage the community that you wish to serve to determine their challenges and needs.

- Draft Your Mission Statement: Ensure it aligns with your purpose and that it connects with your colleagues, potential donors, and the community you wish to serve. Test it out! Your mission statement should be inspiring, motivating, and concise---aim for one memorable sentence.

02 Name your Nonprofit

- Be consistent with your Mission: Your name should align with your mission and be clear and memorable. Consider how it would resonate with the community, potential donors, and volunteers.

- Make it Memorable and Consider your Intended Service Community: A simple and straightforward name will enhance recall and ultimately your visibility. Your name should connect with your intended service community and focus.

- Check Name Availability: Be sure your chosen name is different from other entities on record with the California Secretary of State. Check Business Search: https://bizfileonline.sos.ca.gov/search/business

- Reserve your Name: You may submit a File Name Reservation Request to reserve your name, even before filing incorporation to ensure you can secure your preferred name. https://www.sos.ca.gov/business-programs/business-entities/name-reservations

- Check Domain Name Availability: Nonprofits should secure a domain to ensure a strong online presence. Consider Namecheap, GoDaddy, Squarespace, etc.

A Step-By-Step Guide to Starting a Nonprofit Organization in California (cont.)

03

Recruit Incorporators and Board Members

- Incorporator: Person signing the Articles of Incorporation.
- Board of Directors: Minimum of three directors is recommended (required if applying for 501(c)(3)).

04

Prepare and File Articles of Incorporation

- File with the California Secretary of State.
- Use Form ARTS-PB-501(c)(3) if you're planning to apply for federal tax exemption.
- Include required IRS language on purpose and dissolution of assets
- File online or mail to: File Articles of Incorporation – California SOS

05

Appoint the Initial Board and Adopt Bylaws

- Hold your first board meeting.
- Approve bylaws and elect officers (President, Secretary, and Treasurer).
- Keep minutes of the meeting.
- **Bylaws:** Internal operating rules – not filed with the state but required.

06

Obtain an EIN (Employer Identification Number)

- Apply online with the IRS:
- Get an EIN – IRS Website

07

File Initial Registration with the California Attorney General

Requiredfor most nonprofits operating in California.
- Form: CT-1 (Initial Registration Form)
- File within 30 days of receiving assets.
- CA Attorney General – Registry of Charitable Trusts

A Step-By-Step Guide to Starting a Nonprofit Organization in California (cont.)

08

Apply for Federal Tax-Exempt Status (501(c)(3)) and California Tax-Exempt Status

Apply with the IRS using:

- Form 1023 (standard, longer form)
- Form 1023-EZ (streamlined version, if eligible)

Filing fee:

- Form 1023-EZ: $275
- Form 1023: $600

See IRS Form 1023 Instructions

Once you have federal approval:

- File Form 3500A (short form) or Form 3500 with the California Franchise Tax Board (FTB)
- See California FTB Exemption Forms

09

File Statement of Information (Form SI-100)

Due within 90 days of filing Articles of Incorporation.

- Recurring every 2 years after that.
- File SI-100 Online
- Fee: $20

10

Maintain Compliance

- **Annual filings:** IRS Form 990/990-EZ/990-N, CA RRF-1, CA FTB 199.
- **Renew charitable registration** with the CA Attorney General annually.
- **Maintain good standing** with the Secretary of State.

Board Governance and Recruitment

"Governance is leadership in service — guiding the mission, not controlling it."

A strong board is the backboneof every successful nonprofit. Your board of directors provides the leadership, accountability, and vision needed to guide your organization toward lasting impact.

This section outlines the core responsibilities of nonprofit boards, California governance requirements, and best practices for recruiting members who bring diverse perspectives, skills, and lived experiences.

Effective governance isn't just about compliance — it's about stewardship, collaboration, and modeling the values your organization stands for. A well-equipped board builds trust, ensures transparency, and helps your mission thrive.

"A strong board is not built by titles — it's built by trust, teamwork, and shared purpose."

Building your board is about assembling a diverse team of mission-driven leaders who bring the expertise, lived experience, and commitment your organization needs to grow responsibly.

Use the following worksheet and board agreement template to build a board that will support and sustain your organization's work.

- ·Size: Aim for 5–11 members in your early years — large enough for diverse input but small enough for effective decision-making.
- Diversity: Include members with different skills, life experiences, and community perspectives.
- Balance: Combine professionals (finance, legal, operations) with community and lived-experience leaders.
- Commitment: Seek members who believe in your mission and can actively contribute time, resources, or influence.

Board Recruitment Planning Worksheet

Building an effective and representative board begins with intentional planning. Use this worksheet to assess your current board composition, identify skill and perspective gaps, and outline strategies for recruitment that align with your mission, values, and community representation goals.

Section 1: Current Board Composition

List your current board members and their areas of expertise, lived experience, demographics, and current board role and term end date.

Board Member Name	Professional Skills / Expertise	Community Representation or Lived Experience	Current Role Committee	Term End Date

Board Recruitment Planning Worksheet (cont.)

Section 2: Board Skill & Representation Matrix

Identify which skills, networks, and perspectives are present on your board and where gaps exist. Use this matrix to visualize your recruitment priorities.

Skill/ Representation Area	Currently Represented (Yes/No)	Priority Level (High/Med/Low)	Notes / Ideal Candidate Profile
Finance/ Accounting			
Legal /Governance			
Fundraising/ Development			
Program/Service Expertise			
Lived Experience (Community Served)			
Youth or Emerging Leader Voice			
Marketing/ Communications			
Technology/Data			
Human Resources / Organizational Culture			
Partnerships/ Government Relations			

Board Recruitment Planning Worksheet (cont.)

Section 3: Recruitment Goals & Outreach Plan

Based on your gaps and priorities, outline 3–5 specific recruitment goals and the strategies you'll use to reach potential board members.

Recruitment Goal Target	Candidate Profile	Priority Level (High/Med/Low)	Notes / Ideal Candidate Profile

Section 4: Onboarding & Retention Strategies

Plan how you will welcome, orient, and retain new board members to foster long-term engagement and inclusivity.

Onboarding / Engagement Activity	Purpose or Desired Outcome	Lead/ Timeline

Section 5: Reflections

- What strengths already exist within your current board?
- What voices or perspectives are missing from your decision-making table?
- How will you ensure recruitment and governance practices reflect equity, inclusion, and community voice?

Nonprofit Board Member Agreement (Example)

This agreement outlines the roles, responsibilities, and expectations of members serving on the Board of Directors of **[Organization Name]**. By signing, each board member affirms their commitment to the mission, vision, and values of the organization.

1. **Purpose of the Board**
   The Board of Directors is responsible for governance, ensuring that the organization fulfills its mission, operates in compliance with laws and regulations, and remains accountable to stakeholders, donors, and the community.

2. **Term of Service**
   - Board members agree to serve for a term of **[X years]**, beginning on **[start date]** and ending on [end date], unless re-elected or otherwise specified in the bylaws.
   - Members may be re-elected according to the organization's bylaws.

3. **Duties and Responsibilities**
   As a board member, I agree to:
   - Attend and actively participate in [monthly/quarterly] board meetings.
   - Serve on at least one committee and contribute to its work.
   - Stay informed about the organization's mission, policies, programs, and financial position.
   - Support fundraising efforts, including:
   - Making an annual personal financial contribution of **[amount or "to the best of my ability"].**
   - Assisting with donor cultivation, fundraising events, and introductions to potential supporters.
   - Act in the best interest of the organization, avoiding conflicts of interest.
   - Maintain confidentiality of sensitive organizational information.
   - Uphold the organization's reputation by serving as an ambassador in the community.

4. **Organization's Commitment**
   The organization agrees to provide board members with:
   - Timely, accurate information about the organization's finances, programs, and activities.
   - Orientation and training to fulfill governance responsibilities.
   - Support from staff in carrying out board work.
   - Opportunities to discuss questions and concerns openly and honestly.
   - Recognition of board members' contributions.

Nonprofit Board Member Agreement (Example)

5. **Legal & Ethical Standards**
   Board members must comply with:
   • Fiduciary duties of care, loyalty, and obedience.
   • Applicable laws, bylaws, and board policies.
   • Conflict of interest and ethics guidelines adopted by the organization.

6. **Resignation or Removal**
   A board member may resign at any time by written notice. Failure to fulfill responsibilities, including consistent attendance, may result in removal by the board in accordance with the bylaws.

7. **Agreement**
   By signing this agreement, I affirm my commitment to serve on the Board of Directors of **[Organization Name]**, and to carry out the duties and responsibilities outlined above to the best of my ability.

Board Member Name: ______________________________

Signature: ______________________________ Date: ______________

Board Chair/
President Signature: ______________________________ Date: ______________

Organization Mission Statement

[Insert missionstatement here as a reminderof the shared purpose.]

Articles of Incorporation: Introduction

"Equitable systems start with intentional structure."

Your Articles of Incorporation legally create your nonprofit corporation in California and lay the groundwork for federal and state tax exemption.

Think of the Articles as your organization's birth certificate: they lock in your name, purpose, public-benefit status, and what happens to assets if the organization ever closes.

Getting the language right—especially the charitable purpose and dissolution clauses—is essential for smooth IRS 501(c)(3) approval and California filings.

Articles of Incorporation (California) Step-by-Step Worksheet

Your Articles of Incorporation legally establish your nonprofit as a California Public Benefit Corporation. They define your organization's name, purpose, and structure — forming the foundation for your 501(c)(3) application. This worksheet walks you through each required step to complete and file Form ARTS-PB-501(c)(3) with the California Secretary of State.

Step	Action	What to Enter/ Decide	Notes / Owner	Done (✓)
1	Confirm Organization Name	Check name availability with California SOS. Select		☐
2	Choose Entity Type	"Nonprofit Public Benefit Corporation."		☐
3	Principal Office	Enter city and county for your principal office in California		☐
4	Purpose Clause	Include IRS-compliant charitable or educational purpose language		☐
5	Public Benefit Statement	State that the corporation is a nonprofit public benefit corporation		☐
6	Dedication of Assets	Affirm that assets are irrevocably dedicated to charitable purposes		☐
7	Dissolution Clause	State that assets will go to another 501(c)(3) or public agency upon dissolution.		☐
8	Service of Process Agent	Designate a California resident or registered agent		☐
9	Incorporator	List name and signature of incorporator (may be a founding board member)		☐
10	Filing Method	File online via bizfileonline.sos.ca.gov or by mail		☐

Articles of Incorporation (California) Step-by-Step Worksheet (cont.)

Step	Action	What to Enter/ Decide	Notes / Owner	Done (✓)
11	Filing Fee	Pay required fee (verify current rate on CA SOS site)		☐
12	Stamped Articles	Save the stamped Articles in your records or governance folder		☐
13	Board Adoption	Adopt bylaws and resolutions at your first board meeting		☐
14	Statement of Information	File Form SI-100 within 90 days of incorporation		☐
15	EIN Application	Apply at IRS.gov and retain your EIN confirmation letter		☐
16	Records & Policies	Create a minute book; adopt policies like Conflict of Interest and fiscal procedures.		☐

Required Clauses – Sample Language

Charitable Purpose:

"This corporation is organized exclusively for charitable and educational purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code."

Dedication of Assets:

"The property of this corporation is irrevocably dedicated to charitable purposes, and no part of the net income or assets shall inure to the benefit of any private person."

Dissolution Clause:

"Upon dissolution, assets remaining shall be distributed to an organization organized and operated exclusively for charitable purposes and exempt under Section 501(c)(3) of the Internal Revenue Code."

Pro Tips for a Smooth Filing

- Keep your purpose statement broad — program details go in bylaws or Form 1023.
- Ensure your organization name, address, and purpose match across all filings (Articles, EIN, 1023, bylaws).
- File your Statement of Information (SI-100) within 90 days of incorporation.
- Store your filed Articles and certificate in your governance binder.

Bylaws:
Building the Framework for Governance

Bylaws are the **internal operating rules** of your nonprofit — the framework that defines how decisions are made, who has authority, and how accountability is maintained.

They translate your mission and values into daily practice, **ensuring that leadership, transparency, and integrity** remain at the heart of your organization's operations.

Clear, well-crafted bylaws **protect both your mission and your board** by outlining expectations, roles, and procedures before challenges arise.

They are also **required for IRS recognition of tax-exempt status** and serve as a reference point for funders, auditors, and partners who seek assurance of sound governance.

Bylaws Best Practices

Building equitable, transparent, and mission-aligned governance systems.

Lead with Clarity and Inclusion
Write bylaws in plain, accessible language so all board and community members can understand them. Avoid legal jargon wherever possible.

Reflect Community Voice
Incorporate lived experience and community representation into board structure and decision-making. Diversity should be built into the bylaws — not added later.

Prioritize Transparency and Accountability
Define how decisions are made, how conflicts of interest are handled, and how the board communicates with the community. Transparency builds trust.

Embed Equity in Process
Include procedures for rotating leadership, fair voting, and equitable participation. Equitable governance means everyone's voice has a pathway to influence.

Review and Revise Regularly
Bylaws are living documents. Review them annually or bi-annually to ensure they stay aligned with your organization's mission, scale, and community needs.

Center Wellness and Sustainability
Structure meetings and expectations in ways that honor board members' time, mental health, and wellbeing — trauma-informed leadership begins with how you govern.

Bylaws Drafting & Adoption Worksheet

Bylaws are the internal rules that govern how your nonprofit operates. They define how decisions are made, who holds authority, and how your organization stays accountable to its mission and community. Strong bylaws protect your organization, clarify leadership roles, and ensure consistent, transparent governance.

Section 1: Key Articles to Include

Use this guide to outline your bylaws. Each article represents a core area of governance.

Article	Content Summary	Notes / Draft Language
I. Name & Purpose	States the nonprofit's legal name and its mission or charitable purpose.	
II. Offices	Specifies the principal office location and potential regional offices.	
III. Board of Directors	Outlines size, authority, terms, meetings, and quorum requirements.	
IV. Officers	Defines officer roles (Chair, Vice Chair, Secretary, Treasurer)	
V.Committees	Lists standing and ad hoc committees and their responsibilities.	
VI. Meetings	Describes frequency, notice, and voting procedures for meetings.	
VII. Fiscal Year & Financial Oversight	Defines the fiscal year and financial reporting practices.	
VIII. Conflict of Interest	Establishes standards for ethical behavior and disclosure.	
IX. Amendments	Explains how bylaws can be amended (e.g., 2/3 board vote).	

Bylaws Drafting & Adoption Worksheet (cont.)

Section 2: Drafting Process & Timeline

Use this section to organize who will draft, review, and adopt your bylaws.

Task	Responsible Person(s)	Due Date	Status/Notes
Research sample bylaws and templates			
Draft initial version of bylaws			
Review draft with founding board members			

Section 3: Reflection Questions

- ·Do our bylaws reflect our mission, values, and community-centered principles?
- ·Are roles and decision-making structures equitable and transparent?
- How will we ensure our bylaws evolve as our organization grows?

Nonprofit Board Bylaws Template

This agreement outlines the roles, responsibilities, and expectations of members serving on the Board of Directors of [Organization Name]. By signing, each board member affirms their commitment to the mission, vision, and values of the organization.

Article I: Name and Purpose

Section 1. Name: The name of the organization shall be ________________ (the 'Organization').

Section 2. Purpose: The Organization is organized exclusively for charitable, educational, or other purposes permitted under Section 501(c)(3) of the Internal Revenue Code.

Article II: Board of Directors

Section 1. Authority: The affairs of the Organization shall be managed by the Board of Directors (the 'Board').

Section 2. Number, Tenure, and Qualifications: The Board shall consist of no fewer than three (3) and no more than fifteen (15) Directors. Directors shall serve terms of three (3) years and may be re-elected.

Section 3. Duties: Directors shall actively participate in governance, attend meetings, and serve on committees as needed.

Section 4. Fiduciary Duties: All members of the Board of Directors shall adhere to the following fiduciary duties:

Duty of Care – Directors shall exercise reasonable care, diligence, and informed judgment in making decisionson behalf of the Organization.

a. Duty of Loyalty – Directors shall put the interests of the Organization above personal or professional interests, avoiding and disclosing conflicts of interest.

b. Duty of Obedience – Directors shall ensure the Organization complies with applicable laws, its governing documents, and that its activities remain consistent with its mission and tax-exempt purposes.

Nonprofit Board Bylaws Template (cont.)

Article III: Meetings

Section 1. Regular Meetings: The Board shall meet at least quarterly at times and places determined by the Board.

Section 2. Special Meetings: Special meetings may be called by the Chair or by a majority of the Board.

Section 3. Quorum: A majority of Directors shall constitute a quorum for the transaction of business.

Article IV: Officers

Section 1. Officers: The officers of the Organization shall consist of a Chair, Vice Chair, Secretary, and Treasurer, elected by the Board from among its members.

Section 2. Duties: Officers shall perform the duties usually incident to their offices and such other duties as may be assigned by the Board.

Article V: Committees

Section 1. Executive Committee: The Executive Committee shall consist of the officers and may act on behalf of the Board between meetings, subject to Board approval.

Section 2. Audit Committee: The Audit Committee shall oversee financial reporting, internal controls, and the independent audit process. Membersshall not includestaff or the Treasurer.

Section 3. Governance Committee: The Governance Committee shall be responsible for board recruitment, orientation, performance evaluation, and bylaw review.

Section 4. Other Committees: The Board may establish other committees as needed.

Nonprofit Board Bylaws Template (cont.)

Article VI: Fiscal Year

The fiscal year of the Organization shall be from January 1 to December 31, unless otherwise determined by the Board.

Article VII: Amendments

These bylaws may be amended by a two-thirds (2/3) vote of the Directors present at any meeting of the Board, provided that at least ten (10) days' written notice is given of the proposed amendment.

Certification

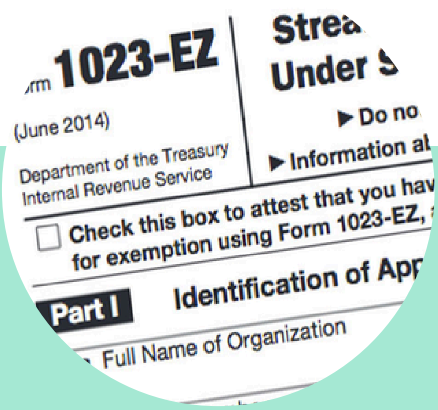
These bylaws were adoptedby the Board of Directorson the ______ day of _________, 20________

____

Secretary

IRS Filing Preparation

“The right form isn’t just about speed — it’s about sustainability and transparency.”



1023-EZ vs. Full Form

Applying for federal tax-exempt status is one of the most significant steps in establishing your nonprofit.

The IRS offers two main options for charitable organizations: Form 1023-EZ (the streamlined version) and Form 1023 (the standard, full application).

IRS Filing Preparation

Before submitting your application for federal tax-exempt status, it’s essential to confirm that your organization’s documents, financials, and governance structures are in order.

The IRS requires detailed information to determine eligibility for 501(c)(3) recognition, and incomplete submissions often result in costly delays or denials.

This following worksheet will help you determine which pathway applies to your organization based on size, structure, and complexity.

These checklists are intended to help you organize everything you’ll need — from incorporation paperwork to program narratives and budgets — ensuring your nonprofit is fully prepared to file your tax forms with confidence and accuracy.

1023-EZvs. Full Form Eligibility Worksheet

Purpose: Use this worksheet to determine which IRS 501(c)(3) application best fits your organization's size, activities, and structure. Completing this tool helps you choose between the simplified Form 1023-EZ and the comprehensive Full Form 1023.

"The right form isn't just about speed — it's about sustainability and transparency."

Quick Comparison Overview

Category Purpose	Form 1023-EZ Simplified online form for smaller nonprofits	Full Form 1023 Detailed review for larger or complex organizations
Avg. Review Time	2–4 weeks	3–6 months
Application Fee (2025)	$275	$600
Eligibility	Must meet strict criteria (under $50k revenue)	Open to all 501(c)(3) applicants
IRS Scrutiny	Limited	Comprehensive review and correspondence

Eligibility Checklist for Form 1023-EZ

To qualify for the EZ Form, your organization must meet all of the following:

- Projected annual gross receipts under $50,000 for the next 3 years.
- Total assets less than $250,000.
- Not a church, school, hospital, or credit-counseling agency.
- Formed in the U.S. as a corporation, trust, or association. Not a successor to a revoked or terminated 501(c)(3).
- Formation documents include required IRS purpose and dissolution clauses.
- No foreign activities or grants to non-U.S. entities.
- Operates exclusively for charitable purposes under 501(c)(3).

1023-EZvs. Full Form Eligibility Worksheet (Cont.)

"The right form isn't just about speed — it's about sustainability and transparency."

Reflection Questions:

Use the space below to assess which application aligns with your organization's goals and readiness:

1. What are our projected annual revenues and total assets?
2. Do we plan to operate internationally or manage complex programs?
3. Are we seeking large foundation or government grants soon?
4. Which form best reflects our transparency and long-term growth goals?

Next Steps:

- Review the IRS Form 1023-EZ Eligibility Worksheet (Appendix A, IRS Instructions).
- If unsure, consult a nonprofit attorney or tax professional.
- Maintain copies of Articles, Bylaws, and financial projections before submission.
- Once approved, calendar annual filings (Form 990, 990-EZ, or 990-N) and state compliance (RRF-1, CT-1, SI-100).

IRS Filing Preparation Checklist

Purpose: Use this checklist to prepare all required documents and organizational information before filing Form 1023 or 1023-EZ for federal tax- exempt status. Completing this step ensures a smoother IRS review process and reduces the risk of delays or rejections.

"Preparation is the quiet work behind every successful filing."

Section 1: Organizational Documents

- ☐ Certified Articles of Incorporation (with charitable purpose and dissolution clause)
- ☐ Bylaws approved and signed by the Board
- ☐ Board Roster with names, titles, and contact info
- ☐ EIN (Employer Identification Number) confirmation letter from the IRS
- ☐ Conflict of Interest Policy (signed by all board members)

Section 2: Narrative & Program Descriptions

- ☐ Mission statement that clearly defines charitable purpose
- ☐ Summary of current and planned activities (include who benefits, where, and how)
- ☐ Explanation of how programs align with 501(c)(3) exempt purposes
- ☐ Descriptions of partnerships or fiscal sponsorships (if any)

Section 3: Financial Information

- ☐ Three-year financial projections (income and expense)
- ☐ First-year operating budget with categories for program, admin, and fundraising
- ☐ Sources of income (grants, donations, earned revenue) Documentation of start-up funding or commitments (if applicable)

Section 4: Governance & Operations

- ☐ Minutes from first board meeting (adopting bylaws and authorizing filing) Policies: Whistleblower, Record Retention, and Gift Acceptance (recommended)
- ☐ Organizational chart or simple diagram of leadership structure Board's plan for oversight and accountability

Section 5: Filing Readiness

- ☐ Chosen IRS form: Form 1023-EZ or Full Form 1023 IRS Pay.gov account created
- ☐ Application fee ready ($275 or $600)
- ☐ State-level filings scheduled (California: SI-100, CT-1, RRF-1) Internal system to track annual 990 filings established

Section 6: Notes / Action Steps

____

____

____

Fiscal Sponsorship

"Fiscal sponsorship turns vision into action — giving good ideas a home while they take root."

For many emerging organizations, **fiscal sponsorship offers a practical and strategic path** to begin operations, raise funds, and demonstrate impact before formally obtaining 501(c)(3) status.

Under a fiscal sponsorship, **your project operates under the legal and tax- exempt umbrella of an established nonprofit**, allowing you to receive grants and tax-deductible donations right away while focusing on program development and community engagement.

Fiscal sponsorship is a partnership in which an existing 501(c)(3) nonprofit (the sponsor) agrees to provide fiduciary oversight, financial management, andadministrative support for another mission-aligned project (the sponsored organization or project).

The sponsor assumes responsibility for ensuring funds are used for charitable purposes and remain compliant with state and federal regulations.

This model is especially valuable for grassroots initiatives, coalitions, or time-limited projects that need structure and credibility before establishing their own nonprofit entity.

Benefits of Fiscal Sponsorship

Immediate Eligibility: Access to grants and tax-deductible donations without waiting for IRS approval.

Administrative Support: Sponsors often handle bookkeeping, payroll, insurance, and reporting.

Reduced Risk: The sponsor ensures compliance with tax laws, protecting your project's reputation and finances.

Learning & Mentorship: Sponsorship can serve as a learning period for developing internal systems before full incorporation.

Tip: Establish a written Fiscal Sponsorship Agreement outlining scope, fees, decision-making authority, and reporting expectations.

Responsibilities of the Sponsored Project

Operate within the sponsor's mission and policies.
Keep your work aligned with your sponsor's purpose and follow their rules and procedures.

Provide regular reports.
Share activity and financial updates to show accountability and progress.

Seek approval for major changes.
Get permission before adjusting programs, budgets, or goals.

Maintain clear communication and records.
Stay transparent through consistent updates and organized documentation.

Fiscal Sponsorship Readiness Checklist

Use this checklist to assess whether fiscal sponsorship is the right option for your emerging nonprofit or project. Fiscal sponsorship provides an opportunity to launch programs under the umbrella of an established 501(c)(3), offering both credibility and administrative support while you build toward independence.

Section 1: Organizational Readiness

Evaluate whether your project has the foundational elements necessary for sponsorship.

- [ ] Clear mission and charitable purpose aligned with community needs.
- [ ] Defined program activities and measurable outcomes.
- [ ] Identified leadership or project manager with adequate capacity.
- [ ] Preliminary fundraising plan or initial funding sources.
- [ ] Willingness to operate under another nonprofit's oversight and reporting requirements.

Section 2: Alignment with Sponsor

Ensure alignment between your project and the sponsor's mission, culture, and compliance standards.

- [ ] Mission and goals align closely with the sponsor's charitable purpose.
- [ ] Sponsor demonstrates strong financial management and compliance record.
- [ ] Roles and responsibilities are clearly defined in a written agreement.
- [ ] Administrative fees and timelines are transparent and reasonable.
- [ ] Both parties understand how funds will be managed and reported.

Section 3: Financial & Administrative Preparedness

Confirm that your project can maintain transparency and accountability within the sponsorship relationship.

- [ ] Draft budget aligns with the sponsor's accounting system.
- [ ] Systems in place for tracking expenses and submitting reports.
- [ ] Understanding of donor intent and restricted funds management.
- [ ] Regular communication plan established with fiscal sponsor contact.
- [ ] Plan for annual reporting and documentation of program outcomes.

Fiscal Sponsorship Readiness Checklist (cont.)

Section 4: Transition & Long-Term Planning

Think ahead about how fiscal sponsorship fits into your long-term goals.

- ☐ Clear timeline for assessing readiness to incorporate as an independent nonprofit.
- ☐ Plan for governance development (board formation, bylaws, EIN).
- ☐ Strategy for maintaining donor and funder relationships post-transition.
- ☐ Understanding of how funds, assets, and intellectual property will be handled upon exit.
- ☐ Commitment to maintaining compliance during and after transition.

Section 5: Reflection Questions

- What value does fiscal sponsorship add to our mission at thisstage?
- Are we prepared to meet reporting and compliance expectations?
- How will this partnership help strengthen our infrastructure and leadership?
- What is our timelineand pathway towardindependence?

Fiscal Sponsorship Agreement Template

This template is designed to help emerging projects and fiscal sponsors establish clear agreements that protect both parties and ensure transparency, accountability, and mission alignment. Customize all bracketed [fields] before signing.

Section 1: Introduction & Purpose

This Fiscal Sponsorship Agreement (“Agreement”) is made between [Fiscal Sponsor Organization Name] (“Sponsor”) and [Sponsored Project Name] (“Project”) effective [Date].

The Sponsor agrees to provide fiscal and administrative support for the Project, which shares the Sponsor’s charitable purpose to [insert mission alignment statement].

- [ ] Confirm mission alignment between both organizations.
- [ ] Attach project summary or proposal as Exhibit A.

Section 2: Scope of Sponsorship

Select the sponsorship model:

- [ ] Model A – Direct Project (Sponsor manages all funds, staff, and contracts)
- [ ] Model C – Pre-Approved Grant Relationship (Project manages its own operations under Sponsor oversight) Describe scope and location of sponsored activities: [Insert Description]

Section 3: Roles & Responsibilities

Sponsor Responsibilities:

- Maintain legal and fiduciary oversight of all funds received on behalf of the Project.
- Provide financial management, bookkeeping, and compliance reporting.
- Review and approve all grant proposals, budgets, and expenditures.

Project Responsibilities:

- Operate within Sponsor policies and applicable laws.
- Submit regular narrative and financial reports.
- Use funds exclusively for charitable purposes.

Section 4: Financial Management

- [ ] Attach approved project budget (Exhibit B). Administrative fee: [%] of all incoming revenue to cover fiscal and administrative costs.

All contributions will be deposited into Sponsor accounts, and disbursements will occur upon approved requests with supporting documentation.
Quarterly financial reports will be provided to the Projectlead by [date range].

Fiscal Sponsorship Agreement Template (cont.)

Section 5: Reporting & Communication

Primary Contact(Sponsor): [Name / Title / Email]

Primary Contact(Project): [Name / Title / Email]

- ☐ Establish quarterly meetings for review and planning.
- ☐ Submit annual narrative report summarizing outcomes and expenditures.

Section 6: Term & Termination

Agreement Start Date: [ ]

Agreement End Date: [ ]

Either party may terminate this Agreement with [30 / 60] days' written notice. Upon termination, remaining restricted funds will be transferred to another 501(c)(3) with a similar charitable purpose, as approved by the Sponsor.

Section 7: Liability & Insurance

- ☐ Sponsor maintains general liability insurance.
- ☐ Project maintains professional or event-specific insurance, if required. Each party agrees to indemnify the other for losses arising from negligence or non-compliance.

Section 8: Amendments & Governing Law

This Agreement may be amended only in writing, signed by both parties. This Agreement shall be governed by the laws of the State of California.

Section 9: Signatures

Fiscal Sponsor:
Name: ______________________________
Title: ______________________________
Signature: ______________________________ Date: ______________________________

Sponsored Project:
Name: ______________________________
Title: ______________________________
Signature: ______________________________ Date: ______________________________

Optional Exhibits

Exhibit A – Project Summary / Proposal
Exhibit B – Approved Budget
Exhibit C – Reporting Schedule
Exhibit D – Contact Directory

Budget & Fundraising Starter Templates

“Budget planning gives you a map. Fundraising builds the fuel to travel it.”

Planning your budget and building early fundraising systems are critical foundations for a vibrant, sustainable nonprofit.

In this section, you’ll find:
An annotated version of the budget template (from the New Hampshire Center for Nonprofits) to plug into your annual plan. NH Center for Nonprofits Budget Template

Key fundraising starter frameworks to help you set realistic goals, diversify revenue, and build relationships with donors and funders.

Use this template to:

- Forecast your annual revenue by category(grants, individual donations, events, earned income).
- List your major expenditure categories (programs, administration, fundraising).
- Monitor variance (budget vs. actual) throughout the year and adjust accordingly.

Tip: Treat yourbudget as a living document — revisit it monthly or quarterly and use it to guide organizational strategy, not just bookkeeping.

How to Use This Section

1. Download the **NH Center for Nonprofits budget template** and open in Excel or Google Sheets.

2. For a Word Document version of the budget template, see the next page.

3. Customize revenue and expense lines to reflect your mission, geography, and scale.

4. Use the fundraising framework to choose two or three priority revenue streams for your first year.

5. Develop a short calendar of fundraising activities that align with your budget needs and community rhythm.

6. Once budget and fundraising plan are in place, move into Fund Development & Communications for deeperstrategy and storytelling.

Three-Year Annual Operating Budget Template

Non Profit Name: ____

		Current Year		Next Year		Following Year	
	Fiscal Year ending:	___/___/20__	%	___/___/20__	%	___/___/20__	%
Revenue and Support							
Revenue	Program Fees						
	Product sales						
	Membership						
Support	Foundation and Corporate Grants						
	Government Grants						
	Contributions and Donations						
Other	Events and Fundraising						
	All Other						
	Total Income						
Expenses	Payroll						
	Payroll Taxes						
	Health Benefits						
	Other Benefits						
	Payroll						
	Subtotal Personnel						
	Program Supplies						
	Board Expense						
	Travel						
	Office Supplies						
	Utilities						
	Marketing and Promotions						
	Insurance: Business/Liability/Real Estate						
	Accounting/Legal						
	Printing						
	Postage						
	Rent						
	Dues & Subscriptions						
	Training/Education - Staff						
	Internet/website						
	Total Expenses						
	Net Surplus (Deficit)						

Fundraising Starter Framework

Use this guide to begin developing your organization's fundraising strategy.

Revenue Streams to Consider

Individual Giving

recurring donors, major gifts, peer-to-peer campaigns.

Grants & Foundations

local, regional, or national philanthropic partners.

Corporate Partnerships

sponsorships, matching gifts, or in-kind donations.

Earned Income

program fees, memberships, or mission-aligned sales.

Events & Campaigns

awareness events or community fundraisers

Setting Your Fundraising Goals

Start with your baseline budget, then determine how to reach your annual funding target by asking:

- What portion of our budget will come from each revenue stream?
- Which donors or partners should we engage first?
- What story or message best communicates our impact?
- What systems (CRM, online platform) will help us manage and track fundraising?

Sample Fundraising Timeline

Q1 Launch website donation page and donor welcome packet.

Q2 Host a virtual 'Meet the Community' or awareness campaign.

Q3 Submit at least two foundation grant proposals; secure one seed gift.

Q4 Launch a year-end fundraising appeal and impact thank-you campaign.

Fund Development & Communications

"People don't give to organizations; they give to stories that move them."

Sustainable funding begins with meaningful relationships — not just transactions.

Fund development and communications are about connecting your mission to the hearts, minds, and values of your community, funders, and partners.

They help you articulate your "why," demonstrate your impact, and inspire others to invest in the change you create.

Foundation of Fund Development

Fund development isn't just fundraising — it's a continuous cycle of **engagement, trust, and accountability.**

At its core, fund development means:

- Building authentic relationships with supporters and partners.
- Communicating your mission and outcomes clearly and consistently. Demonstrating stewardship — the responsible use and reporting of resources.
- Creating alignment between your mission and the priorities of funders and donors.

Effective fund development combines three essential ingredients: strategy, story, and stewardship.

Your funding plan should balance diverserevenue streams — grants, individual giving, earned income, and corporate or public partnerships — while your communications strategy ensures that every audience understands the value of your work.

Tip: Start with two or three manageable strategies — and build capacity over time as your team and systems grow.

Fund Development & Communications Planning Worksheet

Use this worksheet to align your organization's funding goals, communication priorities, and engagement strategies. It helps connect your storytelling and fundraising efforts, ensuring that every message supports both mission and sustainability.

Section 1: Fund Development Goals Overview

Funding Priority Area	Goal / Outcome	Target Amount ($)	Lead / Team	Timeline
General Operations	Secure multi- year unrestricted funding	$50,000	Executive Director/ Board	Q1–Q4
Youth Engagement Program	Obtain seed grant and launch campaign	$25,000	Development Manager	Q2–Q3

Section 2: Revenue Streams & Strategies

Revenue Stream	Planned Activities	Audience / Partner	Tools / Platforms	Notes
Individual Giving	Monthly donor drive, social campaign	Local community, alumni	Donor database, Canva	
Grants & Foundations	Apply to 3 key foundations	Regional funders	Instrumental / Candid	
Corporate Partnerships	Sponsorships for events	Local business partners	Outreach emails, LinkedIn	
Earned Income	Fee-for- service workshop	Community- based orgs	Eventbrite / invoices	

Section 3: Communications Strategy Planner

Key Message/ Story Theme	Target Audience	Channel / Platform	Frequency	Lead/ Responsibility
Empowering youth through art	Funders & community	Instagram, newsletter	Monthly	
Your gift changes lives	Individual donors	Email campaign	Quarterly	

Fund Development & Communications Planning Worksheet (cont.)

Section 4: Donor Stewardship & Relationship Building

Action Step	Purpose / Desired Outcome	Responsible Person	Due Date	Status/ Notes
Send thank you letters within 24 hours	Donor retention & appreciation	Admin/ED	Ongoing	
Quarterly impact updates	Transparency & engagement	Comms team	Q1–Q4	
Board Thank you calls	Strengthen relationships	Board Chair		

Section 5: Communications Calendar Snapshot

Month / Quarter	Major Campaigns or Events	Communication Focus	Due Date	Status/ Notes
Send thank you letters within 24 hours	Donor retention & appreciation	Admin/ED	Ongoing	
Quarterly impact updates	Transparency & engagement	Comms team	Q1–Q4	
Board Thank you calls	Strengthen relationships	Board Chair		