**STARTING AND SUSTAINING A NONPROFIT ORGANIZATION**

Getting off on the right foot is the key to creating and establishing a successful and sustainable nonprofit organization. Periodically reviewing your operating and governance policies and procedures is a critical function of staff and board.

This comprehensive overview is designed to provide you with the basic tools needed to form and maintain a nonprofit organization and incorporate best practices for an existing nonprofit, including templates and samples of governance and operating documents, policies and procedures.

Content includes:

* **Assessing the need for your organization**
* Needs assessment tools and resources
* Environmental scanning
* Benchmarking
* Preparing the mission statement; the “elevator speech”
* **Board of Directors**
* Initial board requirements; legal requirements
* Role of the Board; Board job description and performance standards; fundraising role
* Board terms and term limits
* The principles of due care and diligence, prudence and loyalty;
* Officers; officer succession
* Committees
* Standing; ad hoc
* Executive; Finance; Audit
* **Effective meetings**
* Record keeping requirements; content of minutes
* Open meeting requirements
* **Incorporating**
* Articles of Incorporation; sample Articles; key components
* Member vs. non-member structure – pros and cons
* Fiscal agents; partnerships and coalitions
* **Dealing with the IRS**
* Types of nonprofits; securing 501(c) status
* Completing and submitting form 1023 or 1023EZ; which to use; what the IRS is looking for
* **Federal and state licensing requirements**
* Sources of free and low-cost legal advice and counsel
* **Bylaws**
* What to include
* Sample bylaws
* **Policies and procedures**
* What is required by the IRS; what is optional
* Sample templates
* Whistleblower; record retention; conflict of interest
* Code of ethics; donor bill of rights; gift acceptance; confidentiality
* Financial policies and procedures; gift acknowledgement
* **Political activity and advocacy limitations**
* **Insurance**
* Directors & Officers coverage
* Protecting volunteers and staff; workers compensation
* General liability; financial malfeasance and dishonesty
* Property
* **Emergency planning**
* Crisis plan; disaster recovery
* **Staffing**
* Management models; board-staff relationship
* Limited term and part-time staff; job descriptions and performance standards
* Outsourcing; consultants; interns
* Compensation and benefits
* Staff succession
* Personnel handbook
* Background checks and resources
* **Volunteers**
* Recruitment
* Guidelines and policies
* **Fundraising and development**
* Planning, start-up funding
* Sources of funds; grants; operating and program funds; in-kind support
* Grant sources and proposal writing
* Capital campaigns
* Planned giving and endowments
* Special events
* Data bases and record keeping
* **Strategic planning**
* “Accelerated Planning Model”
* Setting goals and objectives; identifying “outcomes”
* **Marketing and public information**;
* Marketing materials; branding
* Website; social media;
* Working with the media
* Agency spokesperson
* **Finances**
* Budgeting and reporting
* Financial report templates
* Audit requirements