

Nonprofit Startup Resources

NonprofitSource:

Nonprofit Leadership Center resources for nonprofit startups

www.nlctb.org/ns_nonprofitstartup.htm

Florida Incorporation and Uniform Business Report Filing:

Secretary of State, Division of Corporations

www.sunbiz.org

Tax-Exempt Status:

Internal Revenue Service

Forms 1023, 8718, 872-C, Publication 557

www.irs.gov

Federal Employer ID Numbers

International Revenue Service

Form SS-4

www.irs.gov

State Sales Tax Exemptions:

Florida Dept. of Revenue

Form DR-5

www.myflorida.com/dor/forms/

Charitable Solicitation Registration:

Florida Dept. of Agriculture and Consumer Services

Chapter 496, Florida Statutes

www.800helpfla.com

www.doacs.state.fl.us



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Nonprofit Leadership Center of Tampa Bay builds strong nonprofits by providing educational opportunities, conferences, events and networking forums for volunteers, business leaders, and nonprofit organizations throughout Tampa Bay.

Created in 1996 by a group of community leaders, its purpose is to provide management assistance resources to nonprofit organizations. The Nonprofit Leadership Center of Tampa Bay provides a compelling value for public, corporate and private foundations seeking to assist local nonprofits in continual improvement of professional best practices and more effective service delivery.

For more information on the Nonprofit Leadership Center of Tampa Bay and the services they offer please contact at 813 287-8779 or info@nlctb.org

Hear what others have to say about the Nonprofit Leadership Center of Tampa Bay:

"The Nonprofit Leadership Center of Tampa Bay consistently offers high quality, deeply relevant support and training to the nonprofit sector of Tampa Bay. They are an incredible asset to the community."

Mark Van Meter, Executive Director, Everyday Blessings

"Organizational capacity ranks among the top three critical ingredients for a successful nonprofit. When addressing these issues, our first question is: Have you taken advantage of the resources of the Nonprofit Leadership Center of Tampa Bay?"

Joe Clark, President, Eckerd Family Foundation

This brochure was adapted from a number of sources as a general guide to the establishment of a nonprofit organization in Florida. There are many additional requirements depending on the nature of the organization, its intended programs and services, its locale and

Building Strong
Nonprofits

Nonprofit Startup Checklist



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Nonprofit Startup Checklist

Completing each item on this checklist will optimize your chances for success. Keep in mind that the sequence in which you complete these tasks may vary somewhat, but each is important.

⇒ Research, Research, Research

- Research and assess community need.
- Define how the need can be met.
- Define how success can be measured.
- Identify similar programs.
- Investigate opportunities to work with existing organizations as an alternative to creating a new one.

If you complete the above steps and still believe the best solution is to create a new organization...

⇒ Develop, Document and Test Your Idea

- Write draft mission & vision statements.
- Identify clients, partners, competitors.
- Identify revenue/funding sources.
- Write a business plan, including how you will structure, staff, house, market, support, develop and sustain the concept. Include budgets for the first three years of operation (note: this will be useful in filing IRS Form 1023 later).
- Share your plan with potential stakeholders and other advisors; ask for their feedback and make adjustments.

If you have a viable plan and adequate support, go to the next step...

⇒ Begin the Organizational Process

- Identify legal, accounting, and insurance advisors experienced in nonprofit matters.
- Build an initial board of directors with strong commitment and willingness to assume fiduciary responsibilities.
- Select a corporate name.
- Establish a mailing address and other pertinent contact information (e-mail, telephone, fax, etc.).
- Prepare articles of incorporation and file with the Secretary of State.
- File for a Federal Employer ID Number.
- Draft bylaws.
- Open a bank account.
- Hold initial board meeting.

⇒ File of Tax-Exempt Status

- Prepare IRS Form 1023 using data from your business plan.
- Pay fee and attach to Form 8718.

You will generally hear from the IRS within 100 days. If any portion of your application is incomplete or insufficient, delays will result while you work toward compliance. When you are granted tax-exempt status under Section 501(c)3, proceed to the next step.

⇒ File State and Local Applications

- Register to solicit contributions.
- File for sales tax exemption.
- File for county exemptions and licenses as required (varies by county and organizational activities).

⇒ Establish Internal Systems

- Set up operating procedures.
- Adopt accounting systems/service.
- Review needs and secure insurance.
- Set up compliance calendar to ensure timely filing of all periodic and annual reports (local, state, and federal).
- Set up payroll system.
- Develop job descriptions.
- Develop a system to evaluate, analyze, improve and report on program results and effectiveness (a critical tool for management, marketing and fund raising efforts).

Ready, Set, Go: Ongoing Resources

Starting a nonprofit is the easy part. Operating and sustaining a mission-based organization day-in and day-out is another matter.

Nonprofit Leadership Center's on-line NonprofitSource was developed to provide resources throughout the organization life cycle and includes links to hundreds of articles, forms, checklists and "how to" guides for operating and governing nonprofit organizations.

Nonprofit Leadership Center of Tampa Bay also offers educational opportunities, workshops, and information and referral for nonprofit employees, board members and other volunteers.

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