# STEPS TO ENSURE STARTUP SUCCESS FOR YOUR NONPROFIT



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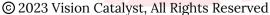
You have dreams.... big ones!... about helping others and making the world a better place to live in.

#### Are you ready for that challenge?

This guide walks you through an important 6-step process that will help ensure you have all the necessary pieces in place to make your new nonprofit successful.

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# **Vision & Mission Statements**

The success of your nonprofit depends on having a clear vision and mission. This helps keep you on track while planning and executing your program strategy. Every organization should revisit these from time to time—as your organization evolves, your vision and mission may need to change with it.

#### **Creating a Vision Statement**

How will the world be different through your work? This is a one-sentence statement that describes the long-term impact of what you do. It should be inspirational, clear, memorable and concise, and preferably 15 words or less. What needs to be changed? Why do these issues need to be addressed (what is the cost for not addressing them)? In a perfect world, what would be the impact? What would success look like?

#### **Creating a Mission Statement**

How does your particular organization help to solve the greater problem? This is a one-sentence statement describing the reason your organization exists. It is key to help guide discussions about priorities and actions. It should be clear, memorable and concise and also 15 words or less. What is the problem/need? Who do you do the work for? Where do you work? What type of project (nonprofit, volunteer program, event)?

# Examples from two top nonprofits: The Nature Conservancy

**Vision:** Our vision is to leave a sustainable world for future generations. **Mission:** To conserve the lands and waters on which all life depends.

#### charity:water

**Vision:** believes that we can end the water crisis in our lifetime by ensuring that every person on the planet has access to life's most basic need — clean drinking water.

**Mission:** We're a nonprofit organization bringing clean, safe drinking water to people in developing countries.

On the next page is a worksheet from topnonprofits.com that I like to use to help my clients clarify their vision and mission.

-- To view a list of 50 great mission statements visit this site: http://topnonprofits.com/mission-statements

#### MISSION STATEMENT (WHY YOU EXIST)

A one-sentence statement describing the reason an organization or program exists

This should be a practical, tangible tool you can use to make decisions about priorities, actions, and responsibilities?

#### NEEDS TO...

$\Box$	be clear and simple (most aren t)
	avoid elaborate language & buzz words
	easily explained by others

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not be	confused	with a	vision	statement
	comasca	VVICII	VISIOII	Statement

...be recognizably yours

#### 1-5 WORD ANSWERS

#### What type of entity/program? Is this important?

(e.g. a nonprofit, volunteer program, event, business, etc)

#### Why do you exist? (problem/needs)

(e.g. Millions lack access to safe water)

#### What's the broadest way to describe the work?

(e.g. Providing clean drinking water)

#### For whom do you do this work?

(e.g. To people without access)

#### Where do you work? (geographic boundaries)

(e.g. in developing countries)

#### **EXAMPLE MISSION STATEMENTS**

charity: water is a non-profit organization bringing clean, safe drinking water to people in developing nations.

HandsOn Network inspires, equips and mobilizes people to take action that changes the world.

View a list of 50 great mission statements

http://topnonprofits.com/mission-statements/

#### **VISION STATEMENT (DESIRED END STATE)**

A one-sentence statement describing the clear and inspirational long-term change, resulting from your work.

These should be practical, tangible tools you can use to lead your group or organization in achieving quality results

#### NEEDS TO...

- ...be clear and simple (most aren't)
- ...avoid elaborate language & buzz words
- ...easily explained by those involved
- ...not be confused with a mission statement

#### **QUESTIONS TO CONSIDER**



What needs to be changed?

What are the major issues or problems?



Why should issues be addressed?

What are their costs to the involved parties?



What are the strengths and assets?

Both of org/program and those being served



What is your dream end-state?

In a perfect world, what would this look like?



What would success look like?

Specifically for this particular project/organization

#### **EXAMPLE VISION STATEMENTS**

No child in our city will go hungry to bed in the evening.

HandsOn Network's vision is that one day every person will discover his/her power to make a difference.

View a large list of example vision statements http://topnonprofits.com/vision-statements/

#### CREATING A VOLUNTEER MANAGEMENT PROGRAM A COLLABORATION BETWEEN











topnonprofits.com handsonnetwork.org pointsoflight.org

@HandsOnNetwork
@PointsofLight

# **Environmental Scan Overview**

Nonprofits are often created because the founder experienced a situation that deeply affected them, their loved ones, or their community in a profound way. They wanted to help others navigate a challenging situation and to make a difference in the world.

But often there is a duplication of services, or the community need has shifted. That can create additional challenges in raising funds, or finding staff, Board members or volunteers. There are around 1.5 million nonprofits registered in the US. It's important that you are always evaluating that your (current and future) programs and services are needed in your community.

That's where performing an Environmental Scan is helpful. The information can provide an organization with important insights that may affect the project plans and alter what decisions are made about the future direction of the organization.

#### What Exactly Is an Environmental Scan?

An Environmental Scan is really just a fancy word for market research. You need to examine some of the internal and external factors that impact your organization or project.

Conducting an environmental scan is an important step to complete whether you are planning to start a new nonprofit or you are an established organization brainstorming new programs to offer.

Nonprofits and programs that fail are often a result of not having a good understanding of what your community actually needs and wants. Or overestimating reliable funding sources, or the availability of interested staff and volunteers. Sometimes the founder, volunteers and Board just don't have the expertise to make the vision happen.

Before moving forward with a new program or nonprofit idea, there are 6 key factors to consider.

#### **6 Key Factors to Consider**

There are six key factors to focus on when conducting a basic environmental scan. This is true whether you are already an established nonprofit or still in the start up planning stage.

- **1.** What is the identified community need that you want to/are providing services for?
- 2. Who else is doing this work in your community?
- **3.** What are you doing or offering that is innovative or unique? What sets you apart from other organizations working in your space?
- **4.** What are your program's strengths and weaknesses?
- **5.** Are there others interested in pursuing this with you? Where will you find volunteers and staff to work in these programs?
- **6.** Where will your major funding come from? Will you be able to fund your nonprofit program's startup phase and beyond?

#### **Conducting a Basic Environmental Scan**

To answer these questions, you will gather data from reliable sources that will provide you with a greater understanding of the external and internal factors that can affect your plans either positively or negatively.

Consider reviewing relevant publications, hosting focus groups, interviewing experienced leaders in the community and specific industries. You could also distribute a prepared questionnaire.

Seek out assistance and advice from your local library, Chamber of Commerce, educational institutions, qualified professionals, as well as other nonprofit leaders in your region.

Organize the date you collect so it can be read, shared with Board members, and referenced objectively. Look for details that might have been missed.

Use what's revealed by your environmental scan to reevaluate your plans. Based on what you've learned, do they have a reasonable chance of success? What tweaks or changes would be wise to consider before moving forward? Has the data given you more confidence to proceed? What other factors would be useful to research?

# 6 Environmental Factors to Research Before Launching A New Nonprofit OR Program

2

1

Who else is doing this type of work?

3

What is the identified community need you are addressing?

What is innovative or unique that sets you apart?

4

What are your program's strengths & weaknesses?

**5** 

Where will you find interested volunteers & staff to help you?

Where is your major funding coming from?

6

# **Recruit Your Board & Volunteers**

No decision you make regarding your nonprofit organization carries more importance than who is chosen to lead it. The members of your Board of Directors make up the governing body of your nonprofit and are legally accountable for its actions. Practically speaking, they are accountable to your supporters and beneficiaries to oversee the accomplishment of the organization's purposes. The buck stops with them...at least it is supposed to! Board recruiting should be on the agenda for every Board meeting.

#### **Forming Your Board of Directors**

Every nonprofit must form a Board of Directors. You need a minimum of 3 members to legally form, but the ideal Board would be an odd number of members between 7 and 11. As a corporation, the Board has financial and legal responsibilities that are detailed in the Bylaws -- which are a Board's internal operating rules.

The incorporator of the nonprofit can appoint the initial Board members and officers, who will be officially elected at the first Board meeting. Future Board members will be elected by a majority of the Board.

#### **Create Your Board Recruiting List**

Board Members then create a list of donors, clients, volunteers, and former Board member referrals, and also evaluate their own network of friends, family, and business acquaintances, to see if any would be a good fit to serve on the Board. This potential new Board member is now considered a candidate.

#### **Characteristics of Great Board Members**

- **1.** You must select people who share your sense of mission. If they do not care deeply about the very purpose of the organization, their value is minimal.
- **2.** They must possess a certain level of business or organizational competency. It is not necessary for them to have prior experience as business leaders, per se, but they should understand principles of good business practices.
- **3.** They should be long-game strategic thinkers.
- **4.** They should be willing to give of their time and money to see the organization's mission accomplished.
- **5.** They should always understand that their role is governance, not management. Governance establishes mission and programs, while management actively works those programs under accountability to governance.
- **6.** And finally, they MUST be people of integrity.

#### Evaluate Your Board's Needed Skillset

It's unlikely that you personally have the all the skills needed to run your nonprofit. So look for people who do have the needed skills. Business skills such as operations management and understanding of finances are important. Also important are additional skills beneficial to the focus of your particular nonprofit.

#### **Recruiting and Engaging Volunteers**

- **1. Create a job description.** If four people walked up to you today and said, "what can we do?," you need to know what your reply would be. Do you have tasks that need to be completed? Are there projects to be done? Has there been one program that could be operational if you had one more person that knows how to [fill in the blank]?
- **2. Start with your friends and family.** Then ask them if they know people that would want to be a volunteer. Any organization that you're a member of is also a place to look into, such as a social group, club, organization, church, etc. Service clubs are often looking for group projects or individual tasks. Social media is a great way to get the word out.
- 3. Make sure to show your appreciation to your volunteers to make them glad that

they chose to volunteer their time, effort, and skills for your organization's purpose. And snacks and refreshments go a long way!

#### **Characteristics of Great Volunteers**

Every successful nonprofit relies on the passion and support of its volunteers. Though they may come in all shapes and sizes and ages, and from a myriad of backgrounds and lifestyles, the best volunteers share five important traits:

- 1. They share the passion and mission you have for your nonprofit.
- 2. They are willing to make a commitment of time and energy, even if that's just an hour or two each month, sometimes more for a special event.
- 3. They've made a point of learning about your organization and what volunteering to help may entail, then sign on where they can be most helpful.
- 4. They stay active, helping with the fun jobs, as well as those boring but necessary.
- 5. They ask questions if they aren't sure about what to do, provide support and encouragement to others, and they are willing to learn from any mistakes they might make.

#### Who will serve on your team?

Use the following worksheet to brainstorm your first roster of Board Directors and key Volunteers.



#### **ENVISION YOUR TEAM WORKSHEET**

Question 1: Who are the 2 or more board members (3 total including you) that are ready to join you in this adventure?

Question 2: Who are the potential volunteers or staff that you have identified to help with the work?

Question 3: What additional training do you or your team need to serve your constituents well?

# Plan Your Programs & Services

People may be the heart of your nonprofit, but the programs and services you offer are its heartbeat. Every time you consider a new program, you need to make sure it is aligned with your vision and mission so you stay on track. Your programs need to be clearly defined so that they attract participants, volunteers, and donors.

Your programs and services need to serve a charitable purpose. This will most commonly include free or low-cost services to a particular people group in some kind of need.

#### What are the Basics of a Program?

Your programs may deliver a specific service, such as food distribution in disaster areas, running a camp for kids, or a broader collection of related services like maintaining a resource database of shelters and helping displaced families find housing.

It's important that every program you offer align with your organization's purpose, vision, and mission.



A program should not be a single one-off unrelated activity nor should it be so broad that it's difficult to understand. The more focused you can be, the more successful you can be. Commonly, when people start a nonprofit they try to do everything. This will cause burn out for you and your team, and will make it more difficult to raise funds from donors. You need to be clear on the relationship between what the program offers, the target participants, and the intended outcome.

Planning is an important, but often overlooked, part of the process of establishing your programs. For many the details of their programs and services live in their head. Even long-established nonprofits can get so caught up with the day-to-day things that they don't take time to evaluate the effectiveness and future feasibility of current programs. It's also easy to fall prey to the lure and excitement of creating new programs while failing to ensure they align well with the nonprofit's vision and mission.

#### **Indulge in Some Brainstorming**

Brainstorming lubricates the creative circuits. Involve others in the organization. Make notes. Dump all the ideas out on paper or whiteboard or digital file. Don't judge any idea in the moment. Decide later which are the good, the odd, and the ineffective ideas.

Consider programs you've been involved with in the past.

- What did you like and dislike about them?
- What do you wish was included and wasn't?
- Are you interested in developing a similar program?
- What new ideas for programs do you have?



#### **Remember Program Planning is a Process**

You need to define your programs before starting your nonprofit. And it's a process that established nonprofits will revisit and refine over time.

You need to be able to provide clear answers to these types of questions for each of your programs:

- Is there a need for this program?
- Who are you providing program services to?
- What specific service(s) does the program provide?
- How does it fit with your organization's purpose, vision, and mission? What type of program is it? (humanitarian relief, transitional housing, resources for disadvantaged youth, language skills courses, etc.)
- Will you offer it free or will there be a cost to participate?
- How often will you offer it? (ongoing, seasonal, twice a year, etc.) Where will you deliver this program?
- Who will manage and deliver this program?
- How will you access the people that you want to help, and will they see your organization as a place to serve their needs?

Make sure your programs are practical and serve a charitable purpose for a specific group of participants in need. If you can't define it well, you will have a difficult time attracting funding, participants, and volunteers.

Below you will find some real-life examples of nonprofits that **Vision Catalyst** has helped to launch.

# Get Inspired By These Real Life Examples



storksupportofnoco.com

# Stork Support of Northern Colorado

This growing nonprofit organization is led by committed community members passionate about providing essential maternity, postpartum and newborn needs to under-resourced families from pregnancy and throughout the baby's first year. They collect gently-used maternity, nursing and baby clothes and gear from the abundance within our community, turn these donations into gift boxes and distribute support boxes to NoCo families. Stork Support also collects donations of new items, such as needed essentials to prepare Postpartum Recovery Kits for parents who have recently given birth and formula to fed our community's babies. Stork Support has been serving Northern Colorado families since 2018 and continues because every new family is worthy of a strong start through support.



re-fined.org

# Re-fined

Its mission is to form empowering and restorative relationships with survivors of sexual exploitation. Its vision is for every survivor to be nurtured to wholeness through deep, connected relationships with Christ and His people. They offer mentorships and a Faithful Friends support program where a member of Re-fined will "walk alongside a survivor of sexual exploitation in their restoration process; helping them reclaim their self-worth, court support, free cosmetology and fashioning services, and a continuing care community.



health4heroes.org

### Health 4 Heroes

The mission of Health4Heroes is to provide veterans and first responders, and their families, access to physical, emotional and spiritual resources in the community that bring health, healing and restoration. It organizes and sponsors events that engage their members with the community through joint activities. These could include fun activities such as bowling, or service projects such as cleaning up parks and trails that enable them to give back to their community. These events are advertised to the community and are free for members and their families. The programs fall into three main program categories: Monthly Social Events, Group Fitness, and Outdoor Recreation.

# More Inspiring Real Life Examples



fromtheheartco.org

# From The Heart Enterprises

Its mission is to make a difference through mental health, unlifting one man, one woman, and one child at a time. It offers a Mile High Chess Club Rights of Passage Program, a Mile High Chess Club, Youth Retreat, a The Survivors Speak Documentary Series, wellness services, after school enrichment, youth/adult mentoring, in addition to other integrated programs, workshops, and trainings.



flameforum.org

#### *FLAME*

Female Leadership and Mentor Exchange - FLAME seeks to advance and empower next generation female leaders by creating and encouraging mentor relationships between women in executive level leadership roles with young women attending college or beginning a career. It encourages and invites top-level women to provide mentor services, in addition to overseeing its mentorship program for recent college graduates and sophomore, junior, and senior college students. It also hosts live FLAME Forum events.



thejetfoundation.com

# The Jet Foundation

This nonprofit was born out of personal experience of a family faced with the father's lung cancer diagnosis which fueled a passion to support others while they navigate their own difficult journeys. It provides funding, nutrition assistance and health resources for individuals and families that are facing a cancer diagnosis. A sampling of its diverse yet on-point events are: Pickleball events, and hair care education and services specifically designed to meet the needs of cancer patients.

These are just six examples of the many wonderfully diverse 501c3 approved nonprofit organizations **Vision Catalyst** has helped launch. What programs will you offer that are true to your nonprofit dream to help change the world and reflect your organization's purpose, vision, and mission in practical ways?

# Funding & Finances

It's easy to get so focused on your big dream to impact the world, that you can overlook the many practical questions about how to actually run the nonprofit! The most immediate question to answer is how you are going to fund your programs and services. And then once you begin receiving funds, you need to determine how you will manage the financials and compliance requirements.

Unfortunately, starting a nonprofit creates a "chicken and egg" problem. You need funding to start a nonprofit, and you need to have IRS approved tax-exempt status to find funding as donors typically want donation receipts for their giving. Hello...Chicken and Egg!

Thankfully, there is a viable solution to solve part of that dilemma.

#### **Funding**

#### A Partial Answer to the Chicken and Egg Dilemma

As soon as you file your 1023 Application (the paperwork you file with the IRS to apply for tax-exempt status), you can begin raising funds and issuing tax receipts. In fact, when the IRS grants you tax-exempt status and mails you the exemption letter, they will record your effective date of exemption as the date you filed your Articles of Incorporation.

The only caveat here is that you need to let your donors know that you have filed for your tax-exempt status, and in the event your application isn't approved, their donations would not be tax deductible.

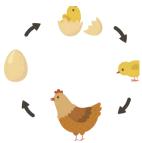
#### **Upfront Costs**

The cost to file the nonprofit application will range from \$275 to \$7,000+ depending on whether you DIY it (not recommended) or hire a document filer, a nonprofit consultant (like Kim Fisher), a CPA, or a lawyer to help you.

The IRS filing fee will be either \$275 or \$600 depending on how complicated your organization is, and how much money you intend to raise. There will also be a state incorporation fee. This is money that needs to be raised prior to submitting your application for tax-exempt status.

#### Return of the Chicken and Egg

You might think those upfront costs could be covered with grant funding or raising money via a crowdfunding site such as Go Fund Me, CrowdRise or Mightycause. Unfortunately, neither of those are great options.



The mechanics of grant funding is one of the most misunderstood concepts in the nonprofit world. Grantors expect an organization to already be operating successfully before they consider awarding funds. They will want to see that you have a variety of other funding sources before they invest in you.

They also want to know the outcomes of your work. It's a similar concept to applying for a loan. Before making you a loan, a lender wants to know what other credit you have, and how well you have managed it.

Crowdfunding sites may be an option but realize that you don't "own" the donors and that donor receipts are mailed with the crowdfunding site's name on it, not that of your nonprofit.

#### Finding a Golden Goose or two

It's common for many nonprofit founders to self-fund their initial start-up costs. This money can be given as a donation to the organization, and the founder would get a tax receipt. Or a founder could make a loan to the organization that can be repaid once other funding comes in. It needs to be booked in your accounting system as a loan.

Friends and family may also be willing to help fund your initial costs. They are the people who are most likely to believe in the organization's vision before it has an established track record. That's because they're betting on YOU more than anything else.

When trying to raise seed money, nonprofit founders should reach out to family and friends by making phone calls, meeting in person, or writing a personal email appeal. Be ready to clearly explain three things:

- 1. Why you want to start the organization and what the vision is
- 2.How the money is going to help the organization take its first step towards realizing that vision
- 3. How family and friends can contribute (include donation instructions)

Nonprofits give donors the opportunity to identify with something larger than themselves. They give them the chance to feel good about making a difference and helping others. These intangible benefits can be thought of as the "return" the organization offers to potential "investors."

Again, this money can be given as a donation to the organization, or a loan to the organization that can be repaid once other funding comes in.

#### **Budgeting**

#### You've got your starter funding, now what?

Your next task is to create a budget. Not just for your first year, but the following two years as well (which is required for the 1023).

Obviously, you won't know the actual figures nor every line item you'll eventually track as part of your bookkeeping system. Just do your best to determine a reasonable estimate.

Consider which expenses might increase or decrease in the following years. For instance, you may plan to have paid staff starting in year 2. You may generate revenue from program fees. You may pay for professional assistance.

To begin, focus on providing estimates that answer two questions:

#### Question 1:

How much do you expect to spend on salaries, office expenses, fundraising costs, and program expenses?

#### Question 2:

How much income will you need to cover the expenses, and what is your plan for raising those funds?

#### **Example Categories to Project**

Expenses	Support & Revenue
<ul> <li>Accounting/Bookkeeping</li> </ul>	<ul> <li>Donations</li> </ul>
<ul> <li>Marketing Expenses</li> </ul>	<ul><li>Grants</li></ul>
<ul> <li>Fundraising Event Expenses</li> </ul>	<ul><li>Program Fees</li></ul>
<ul> <li>Program Expenses</li> </ul>	
• Rent	
<ul> <li>Salaries</li> </ul>	
Office Expenses	

#### Managing the Money

The third question that should be dealt with sooner than later is:

Question 3: How will you manage the finances and issue donor receipts?

Bookkeeping is an essential component of every nonprofit. It is the meticulous process of recording and organizing financial transactions and represents the backbone of the financial system. You will need an effective way to track your income and expenses so that you can issue receipts to your donors and produce financial statements. And you need to be able to issue 1099s/W2s to your employees and contractors. Finally, you need to file an annual tax return.

Only the tiniest of nonprofit organizations can manage with a manual bookkeeping and accounting systems. Most rely on digital accounting software with QuickBooks being the most popular, or an Excel spreadsheet if funds are scarce.

Some nonprofits hire a finance manager or outsource their financial recordkeeping and reports. Once your nonprofit is approved, you can get QuickBooks at a discount through TechSoup www.techsoup.org.

Having integrity in your financial management is important to operating a legally functioning nonprofit. The IRS is very specific. Fundraising, bookkeeping, accounting, and tax reporting are handled differently for nonprofit organizations that for-profit businesses. Poor tracking of income and expenses, and not filing tax returns on time, can lead to significant issues down the road, and can even result in the IRS dissolving your nonprofit.

Don't let securing your initial start-up funds, pulling together your first budget estimates, and mapping out your money management structure dim your nonprofit dreams. Trust that if you believe in your dream of helping to change the world others will believe in it, too.

Tackle these necessary funding and finance tasks head on. Once completed they will help propel you forward toward turning your dream into a reality.

→ BTW, Vision Catalyst offers financial management services to nonprofits!

# Marketing & Outreach

Transforming your dream into a functioning nonprofit organization takes effort and careful planning. In addition to establishing your vision, mission and values, there's the environmental scan to perform, recruiting your Board and volunteers, determining your programs and services, fueling your startup costs, and setting up your financial management systems.

And now you need to promote your nonprofit through marketing and outreach. Your community, your donors and your clients need to know you are open for business and ready to serve. The most productive effort comes from planning effective communication strategies that lead to doable tactics...the actual action steps that you and your volunteers will carry out.

Let's explore how to build a successful marketing and outreach plan.

#### **Understanding Basic Terminology**

#### The difference between marketing and outreach

**Outreach** is a type of marketing that focuses on reaching out to potential donors, sponsors, volunteers, even your prospective clients. You might email or call someone, meet up with a friend or two, or attend a gathering where you have the opportunity to share information about your nonprofit. Whether planned, or in the spur of the moment, a lot of outreach happens on a one-to-one basis or with small groups. These activities usually have a lower financial cost, but a bigger cost in time.

**Marketing** encompasses everything you do to promote your nonprofit; from the moment you conceive your dream...to recruiting others to help...to requesting donations...to encouraging word-of-mouth recommendations. Often there are financial costs involved with marketing.

You may decide to invest in printed informational brochures or advertising for a special event. However, many free and low-cost opportunities exist. Consider posting flyers on community activity boards, sharing on social media platforms, submitting PR releases to area newspapers and other media, or pursuing speaking engagements.

#### The difference between strategies and tactics

**Strategy** is the plan. **Tactics** are the individual action steps that bring the plan to life.

Mapping out a strategic plan should always come first. It should be in line with your vision, mission, and values. Invest the time to research what other nonprofits are doing, and consider what's doable for you to achieve within 1 month, 6 months, 1 year, and 5 years.

Establish benchmarks for goals to reach so you can track results and develop procedures to evaluate which strategies, as well as tactics, can be improved upon or to consider ditching altogether in the next cycle.

While strategic plans are not carved in stone, they should not be changed without careful thought and data. Tactics, on the other hand, can easily be adjusted to correct the course of action or take into account new possibilities and opportunities.

#### **First Steps to Creating Your Strategy**

- Define your strategies and identify your primary goals. Are you looking to:
  - Raise money?
  - Reach more people in need of your programs and services?
  - Increase your visibility within the community, such as through being featured in articles, or invited to guest speak?
  - Increase your volunteer base?
- Determine the budget you have available
- Determine the types of events to host
- Identify any activities that are not workable due to time involved or cost
- Determine how the efforts will be measured and evaluated
- Identify the key people involved
  - Who will be tasked with coming up with the tactical action plan?
  - Who will be in charge of carrying out the plan?
- How will reporting to the Board or committee chair be handled?

#### Some Marketing and Outreach Ideas

Here are just a few examples for handling outreach to donors, volunteers, and media sources:

- Direct mail
- Email
- Phone calls
- Cross-promotion with other groups
- Social media
- In-person meetings and group gatherings



There are many excellent resources available in books and online with ideas to consider. Some resources even provide detailed action step plans. Many ideas used by for-profit businesses can be adapted for use by nonprofits as well.

>> Nonprofit Community Growth 101: Simple Ways to Increase Engagement
<a href="https://blog.elevationweb.org/nonprofit-community-development-101-simple-ways-to-increase-engagement">https://blog.elevationweb.org/nonprofit-community-development-101-simple-ways-to-increase-engagement</a>

#### >> 10 Nonprofit Marketing Ideas for 2022 and Beyond

https://www.constantcontact.com/blog/nonprofit-marketing-ideas/

#### >> Microsoft 365 Resources for Nonprofits

https://www.microsoft.com/en-us/nonprofits/microsoft-365

If you're a little shy about bringing attention to yourself, or speaking in public, you are going to have to get over that quickly! To make your dream a reality, you need to be prepared to knock on every door and try every option to promote your nonprofit. If you are clueless about marketing, consider working with a marketing professional. Many offer discount services to nonprofits or even pro bono help. Just like any business, you do need to spend money to make money.

The opportunities are out there. Believe in your dream. Invest time and effort into creating specific marketing and outreach strategies that can be carried out with practical, repeatable action steps. Learn to take those baby steps and build on each success.



# Your Next Step

I'm Kim Fisher, Chief Strategist here at Vision Catalyst, where my passion is helping others launch successful 501c3 nonprofit organizations both in the United States, as well as around the world.

I hope you found this resource guide beneficial. Completing these steps is essential to help ensure your new nonprofit organization will be successful.

Have you considered working with an expert to speed up the 501c3 application process? I'd love to help clarify any questions you have about what's need to apply and get formal tax-exempt approval from the IRS. Both the DIY method and those online legal sites can create unnecessary and expensive challenges.

Make your very next step a free Discovery Call with me today.

Click to Book a Call

https://calendly.com/kimberlyfisher/30min-discovery-cq

