

# START A NONPROFIT Planning Workbook





**"A goal without a plan is just a wish."**

**— Antoine de Saint-Exupéry, writer and pioneering aviator —**

It's time to start putting your dream plans into motion. Use the following prompts to help you flesh out your nonprofit idea.

## **STEP 1: VISION, MISSION, AND VALUES**

*Question 1:* **Vision: How will the world be different through your work?**

*Question 2:* **Mission: What is your day-to-day focus, and activities you will do to accomplish your vision?**

*Question 3:* **Values: What beliefs are core to how you will operate and drive your organization?**



## STEP 2: IDENTIFY A COMMUNITY NEED

*Question 1:* What is the need in the community that you are responding to?

*Question 2:* Who else is doing this work?

*Question 3:* What are you doing that is innovative or unique?



## STEP 3: ENVISION YOUR TEAM

*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?



## STEP 4: PROGRAMS AND SERVICES

*Question 1:* How will you practically address the needs of your constituents?

*Question 2:* What are some key programs and services you plan to offer?

*Question 3:* How will you access the people that you want to help, and will they see your organization as a place to serve their needs?



# FUNDING

## STEP 5: FUNDING & FINANCES

*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?

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



## STEP 6: MARKETING AND OUTREACH

*Question 1:* What have you done to research your nonprofit idea and to study how other nonprofits work? What did you discover?

*Question 2:* How will you reach your community, your donors and your constituents?

*Question 3:* How will you keep people informed about your work?



## Now what?

**If you are ready to start your nonprofit, you have a few options.**

- **DIY Method:** it can be tempting to use the DIY method. But, in order to get approved, you need to know exactly what they are looking for.
- **Legal Sites:** you may try to use one of those online legal sites to “autofill” your form. They are certainly more affordable, but you still need to do all the work!
- **Hire a Lawyer:** sure, you could hire a lawyer to do it, but many law firms charge upwards of \$5,000-15,000.
- **Work with an experienced nonprofit strategist!**

## Talk with Kim

**Talk to Kim Fisher, Chief Strategist at Vision Catalyst.**

Schedule a complimentary Discovery Call with Kim today to see if forming a nonprofit is right for you. Here's the link to her booking calendar.

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

Kim has over 30-years' experience as a nonprofit executive and can cover every aspect of the formation process for you. She understands what's needed to ensure that all IRS requirements are satisfied, how to carefully complete all the necessary documents, and how to file the application with the IRS.

Don't let your dream of helping to change the world be delayed any longer. Your people are waiting for you!

Schedule that complimentary call with Kim now. Give wings to your dream.