The Checklist You Need When Starting a Nonprofit

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If you're starting your own nonprofit, you need a simple way to remember everything you have to do to keep it running smoothly.

To help you out, here is a checklist you can use to set monthly priorities and keep operations on track. Feel free to use it as a starting point and customize it to fit your own needs by adding or removing list items.

Even if you're an established nonprofit, you can use this checklist — just skip the first section and use the rest every year or quarter to ensure you're staying on track.

1. First Steps to Start a Nonprofit:

- ☐ Name your nonprofit
- ☐ Your mission statement has been written
- ☐ Your articles of incorporation have been written
- ☐ Your bylaws have been written
- ☐ Create a business plan
- ☐ Apply for tax exemption by filing Form 1023 with the IRS
- ☐ If needed in your state, additional tax exemption forms for 501(c)3 have been filed
- ☐ You have obtained an EIN (Employer Identification Number)
- ☐ Your staff positions have been decided on
- ☐ Hiring has begun for staff
- ☐ Your nonprofit office space has been decided on

2. Financial Planning:

- ☐ Register for charitable solicitation (if applicable in your state)
- ☐ Create a budget for your nonprofit
- ☐ Get the budget approved by your board
- ☐ Quarterly financial statements are available to the board and at meetings
- ☐ Each board member has submitted a plan to meet their goals and budgets
- ☐ All financial records are in one place and ready for year-end reporting/auditing
- ☐ All receipts and invoices are submitted
- ☐ Budget targets are tracked and reviewed monthly

3. Board and Operations Planning:

☐ All staff/board member orientation materials are up-to-date and distributed

☐ Board recruitment is complete and all positions have been filled

☐ Board meeting dates are set for the next quarter

☐ Meeting minutes are documented and are easily accessible for all staff/board members (see our complete guide on how to write effective meeting minutes)

☐ Staff/board evaluation dates have been set for the quarter

☐ All of the volunteer board member roles are filled

☐ A plan is in place for board member transitions

- Information gathering and transfer
- Introduction to appropriate staff and volunteers
- Orientation and plan/budget review & baton passing

4. Fundraising Planning:

☐ Reports created for concluded campaigns

☐ Targets set for future campaigns

☐ Internal fundraising calendar of goals and events up to date

☐ Fundraising action plan created

☐ Fundraising contingency plan created

☐ Fundraising goals and status are updated on the website

☐ Prompt acknowledgements and thank you letters are set up to go out to all donors and volunteers

5. Volunteer Planning:

☐ Volunteer positions needed have been identified

☐ A volunteer management plan has been created

☐ Volunteer interviews have begun

☐ All volunteer positions have been filled

☐ Volunteers have been orientated

- ☐ Regular volunteer check-ins have been implemented
- ☐ A reserve of "emergency" volunteers has been created
- ☐ Volunteer appreciation materials have been created and gone out

6. Marketing Planning:

- ☐ Marketing plan has been created
- ☐ Annual report plan has been created

Social Media Updates:

- ☐ Desired social media accounts (ex: Facebook, Twitter) have been created
- ☐ Social media strategy has been created
- ☐ Social media feeds are populated with content

Email Updates:

- ☐ An email platform has been chosen
- ☐ Your email calendar for the month has been decided upon
- ☐ Regular email analytics checks (open rate, unsubscribe rate, etc) have been scheduled

Website Updates:

- ☐ You have created a website for your nonprofit
- ☐ News section is up to date
- ☐ Member-of-the-month updated
- ☐ Images from latest event added
- ☐ Contact information is accurate
- ☐ Latest blog post is recent

7. Data Management Planning:

- ☐ A system for managing members, donors, and volunteers has been implemented
- ☐ Member database is up to date
- ☐ Donor database is up to date
- ☐ Volunteer database is up to date

8. Member Management Planning:

- ☐ Membership levels are decided upon
- ☐ Member recruitment tactics are planned
- ☐ Membership plans and pricing is up-to-date on the website and all promotional materials
- ☐ Renewal reminder letters and emails are scheduled to go out
- ☐ New member orientation guide is up-to-date and sent out automatically with a new member welcome email
- ☐ The member-only area on the website is updated with the latest resources
- ☐ Annual member survey date and questions are set

9. Event Planning:

- ☐ Annual General Meeting date set
- ☐ Event calendar for the year is published on the website
- ☐ Fundraiser dates are set
- ☐ Event Chairs are in place for all events
- ☐ All events have networking pre-sessions for members
- ☐ Speakers confirmed for the rest of the year
- ☐ A variety of events and topics are booked (lunch and learns, speaker series, fun activities, fundraisers, etc.)
- ☐ Event promotional package created (press release, email invites, etc.)
- ☐ Staff/board members are assigned to seek out PR promotions (radio, local newspaper, TV spots, etc.)
- ☐ Social media promo posts scheduled to go out on Facebook, Twitter, and LinkedIn
- ☐ Registration and attendee lists have been imported into the member database (consider using membership management software to do this automatically online)

We hope that this checklist will help you keep your growing nonprofit on track. Best of luck with your planning!