

TASK	PURPOSE/RATIONALE
<b>Write a mission statement</b>	Puts nonprofit's purpose in writing. Helps guide other actions.
<b>Conduct a needs assessment</b>	Identify nonprofit's constituents/recipients and needs.
<b>Select a board of directors</b>	Identify, approach, interview, evaluate, retain suitable additions.
<b>Name nonprofit</b>	Consider a name that best represents organization and its purpose.
<b>Establish legal foundation</b>	Protect nonprofit from conception, and ensure compliance with all laws.
<b>Draft bylaws</b>	Create bylaws. Bylaws help the nonprofit operate optimally and by a set of guidelines.
<b>File articles of incorporation</b>	These are legal documents that can be filed with or without an attorney.
<b>Apply for EIN</b>	Request and complete EIN form from the IRS.
<b>State regulations and requirements</b>	Most states have regulations relevant to nonprofits.

<b>Create a budget</b>	Every enterprise needs a budget to help with funding, projections, and operating budgets.
<b>Open bank account</b>	Assemble the necessary documents and ID numbers to establish a dedicated business account.
<b>Obtain insurance</b>	Determine needs, potential liabilities, secure proper coverage limits and policies to protect nonprofit.
<b>Record keeping</b>	Establish best practices, identify responsible professionals (treasurer or accountant), and begin documenting.
<b>Hold kickoff board meeting</b>	Consider drafting a pre-meeting plan detailing topics, time allotted per topic, and other details.
<b>Develop a fundraising strategy</b>	Develop fundraising goals and strategies, and assign various tasks and goals to all members of the team.
<b>Review compliance with employment laws</b>	Ensuring compliance with all applicable labor or employment laws protects the nonprofit, and ensures smooth operations.
<b>Promote and market the nonprofit</b>	Develop marketing, publicity, and advertising strategies, calculate a budget based on objectives and budget.
<b>Build a website and claim all social media platforms</b>	Digital marketing and promotions are essential to promoting nonprofits effectively and reaching mass audiences worldwide.
<b>Stay industry current</b>	Study, read, attend events, conference, join professional online groups, and continue learning.































































ASSIGNED PARTY	DATE ASSIGNED
Legal counsel may need to be retained for research and registration.	
Internal or external legal counsel should be retained or consulted.	
May be helpful to confer with an attorney or legal counsel.	
May be helpful to confer with an attorney or legal counsel.	
Anyone with the organization can request and file for an EIN.	
May be advisable to consult legal or business experts	

<p>This may be a collaborative or team effort.</p>	
<p>This may be a collaborative or team effort, or handled by the treasurer.</p>	
<p>This is a decision best guided by legal, accounting, or insurance professionals.</p>	
<p>Bookkeeping and accounting should fall to either to an accountant, CPA, treasurer, or other qualified specialist.</p>	
<p>All board members should be responsible for a portion of a presentation covering their specific duties and insights.</p>	
<p>While many fundraising tasks may fall to specific members, but should include all members of the nonprofit--employees, volunteers, etc.</p>	
<p>Employment or labor laws and compliance should be reviewed, communicated, and verified by HR, legal or other professionals.</p>	
<p>This important task should either be handled by an outside agency, media planner, publicist, or another staff member with marketing skills.</p>	
<p>The nonprofit can seek outside vendors to create a website or run social media marketing, but it can also be executed by nonprofit staff members.</p>	
<p>All nonprofit board members and staffers should aspire to remain knowledgeable and industry current. Acquiring more knowledge aids the nonprofit.</p>	

































































DUE DATE	DELIVERABLES	COMPLETE
	Google Doc or Microsoft Word.	FALSE
	Google Doc or Microsoft Word.	FALSE
		FALSE
		FALSE
	Legal documents, charters, and relevant filings.	FALSE
	Google Doc or Microsoft Word document.	FALSE
	Google Doc or Microsoft Word document filings or documents.	FALSE
	IRS online application. File and submit online.	FALSE
	Complete and submit any required state documents or filings.	FALSE





































































**NOTES**









































































































































































































MILESTONE	DESCRIPTION	SCHEDULED DATE	STATUS
Milestone 1	[Description]	[Date]	[Status]
Milestone 2	[Description]	[Date]	[Status]
Milestone 3	[Description]	[Date]	[Status]

### Guide:

**Milestone** : Key stages or significant achievements in the project.

**Description** : A brief explanation of what each milestone represents or entails.

**Scheduled Date** : The planned date for reaching each milestone.

**Status** : Current progress status of the milestone (e.g., not started, in progress, completed).

**Dependencies** : Any other tasks or milestones that must be completed before this one.

**Responsible Party** : The individual or team accountable for achieving the milestone.

































































DEPENDENCIES	RESPONSIBLE PARTY
[Dependencies]	[Party Name]
[Dependencies]	[Party Name]
[Dependencies]	[Party Name]



































































































































































































ITEM	ESTIMATED COST	ALLOCATED BUDGET
Item/Category 1	[Estimated Cost]	[Allocated Budget]
Item/Category 2	[Estimated Cost]	[Allocated Budget]
Item/Category 3	[Estimated Cost]	[Allocated Budget]

### Guide:

**Item:** Different categories or specific items for which costs are incurred.

**Estimated Cost:** The anticipated or projected cost for each item or category.

**Allocated Budget:** The amount of money allocated or budgeted for each item or category.

**Source of Funding:** Where the funds for each item or category are coming from.

**Remarks/Notes:** Any additional information, considerations, or specifics about the costs or budget.































































[Dark Teal Header]		[Light Green Header]
SOURCE OF FUNDING	REMARKS/NOTES	
[Funding Source]	[Notes]	
[Funding Source]	[Notes]	
[Funding Source]	[Notes]	



































































































































































































COMMUNICATION ASPECT	METHOD	FREQUENCY	TARGET AUDIENCE
<b>Project Updates</b>	[Method]	[Frequency]	[Audience]
<b>Stakeholder Engagement</b>	[Method]	[Frequency]	[Audience]
<b>Team Meetings</b>	[Method]	[Frequency]	[Audience]
<b>Reporting</b>	[Method]	[Frequency]	[Audience]
<b>Emergency Communication</b>	[Method]	[Frequency]	[Audience]
<b>Feedback Mechanisms</b>	[Method]	[Frequency]	[Audience]

### Guide:

**Communication Aspect** : Different elements or types of communication within the project.

**Method** : The means or channels used for communication (e.g., email, meetings, newsletters).

**Frequency** : How often the communication occurs (e.g., daily, weekly, monthly).

**Target Audience** : The specific group or individuals who are the recipients of the communication.

**Responsible Party** : The person or team responsible for initiating and managing this communication.

**Notes** : Any additional details or specific considerations related to the communication strategy.

































































































































































































































































