



# Nonprofit Essentials 101

## Your First Year Road Map



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Making a Difference in the Community



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## About Your Presenter: Cheryl Smith

1. **Current:** CEO, Dewlyn Nonprofit Services.
2. **Reach:** Training, start-up, and strategic alignment for thousands of nonprofits each year. U.S. Small Business Week Presenter for SBA/SCORE and Maui, HI. Training for faith-based, universities, banks, community-based organizations and SCORE chapters across the U.S.
3. **Experience:** 25+ years in Nonprofit Sector, including C-Level and Board Positions.
4. **Education:** BA, Michigan State (MI); MPA, Kennesaw State (GA).
5. **Past Contribution:** Secured millions in grants for small nonprofits.
6. **Author:** 21 Ways to Fund a Nonprofit.
7. **My Favs:** Morning runs, books on the quantum field, metaphysics and consciousness, and making soap!
8. **Other Wins:** Mother to 3 amazing people & Nanna to 1 brilliant future leader. ❤️

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## You're in the right place if...

1. Considering establishing a nonprofit
2. Newly formed nonprofit
3. Feel like you've missed something
4. Opened to learning

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# Workshop Logistics

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**Run-Time: 70**  
minutes

**Q & A: 20**  
minutes

**Presentation:**  
Available thru  
SCORE

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**Your first 12  
months are  
important.**

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Let's make certain you have  
a clear path to success!



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# Before we get started...

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## **Our Discussion**

1. Quarterly Planning
2. Annual Compliance
3. Planning & Development
4. Nonprofit Support

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# **Quarterly Planning**

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## Year I Checklist

### Months 1-3

- Board Meetings
- Program Development
- Required Registrations
- Nonprofit Insurance



### Months 4-6

- Strategic Landscape
- Program Operations
- Income & Sustainability

### Months 7-9

- Program Resources
- Program Launch
- Funding Applications
- Professional Development

### Months 10 -12

- Organization Evaluation
- Board recruitment
- Prepare new budget

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## First 3 months

“Give me six hours to chop down a tree and I will spend the first four sharpening the axe.”

Abraham Lincoln

### Laying the Foundation

1. Board Meetings
2. Program Development
3. Required Registrations
4. Nonprofit Insurance
5. Internal Controls

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## Newly Formed Nonprofits:

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- Common practice to schedule meetings once a month.
- Create your [corporate binder](#) before you hold your first board meeting and update it as you go.

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# Prepare for First Board Meeting

## Corporate Binder

- Organizing Documents
- Board Agenda & Minutes
- Binding Agreements
- Board Resumes



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**Arnold Schwarzenegger**

CA, USA  
88 888  
holtTerminator@gmail.com

**Personal Statement**  
Former body builder and action hero, currently looking for a role as a double agent for the right pay. Experienced in tracking down all threats from the future and barbarian cult leaders.

Also has experience using Microsoft Excel, PowerPoint and Word.

**Experience**

**Governor of California, USA**

- Government representative of the American people
- Passing, repealing and drafting laws to improve the state and protect the economy of California by supporting the people.

**Locations**

**James Bond**

Intelligence Specialist / Security & Surveillance

**EXPERIENCE**

**British Secret Service, London** — *Intelligence Operative*  
Jan 2001 - Present  
Protecting the UK and her allies from nefarious masterminds from around the world.

Liaising with intelligence services around the world including the CIA, MI6, and the GCHQ.

Instrumental in foiling international terror attacks including the destruction of Fort Knox and the destruction of the world by various means.

**Royal Navy, Portsmouth, UK** — *Commander*  
Jan 1990 - Dec 2000  
Special intelligence department of Royal Navy, tasked with identifying threats to national security.

In charge of elite unit of highly trained operatives seeing action in theatres from Russia and Soviet Union, Africa and Middle East.

**EDUCATION**

**University of Geneva, Geneva** — *Masters*  
Sept 1985 - Jul 1990  
French and German

## Board Resumes

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- Chronological style
- White paper
- No photos or artwork necessary
- Plain and boring is best!

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# Board Meetings



## First Meeting

- Elect Directors
- Appoint Officers
- Approve Bylaws
- Adopt a Conflict-of-Interest Policy
- Approve Resolutions (Opening Organization's Bank Account)
- Maybe: Discuss Programs
- Maybe: Discuss Committees

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# Committees

A Nonprofit Committee is made up of 2 or more board members that meet outside of the Board meetings to conduct the work of the board.

## Common Committees:

1. Finance Committee
2. Fundraising Committee
3. Governance Committee



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## Necessary Resources

It is **always** the board's responsibility to ensure adequate financial resources for the organization.

- Identify resources needed
- Establish plan for how these resources will be acquired
- Determine board member involvement

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## Program Development

- Corporate presence (address, phone, email, and website)
- Program description(s)
- Create organization and program budget



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## Required Registrations

Running your nonprofit corporation legally also means securing all applicable licenses and permits.

- State income & sales tax exemption
- Business license
- Charitable registration



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## Determine Nonprofit Insurance

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### Nonprofits need protection too!

- General Liability
- Auto Insurance
- Directors and Officers Liability
- Professional Liability

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## Months 4, 5, and 6

“Strategy is a fancy word for coming up with a long-term plan and putting it into action.”

Ellie Pidot

### Systems & Strategy

1. Strategic Support
2. Program Operations
3. Income & Sustainability

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# Strategic Support

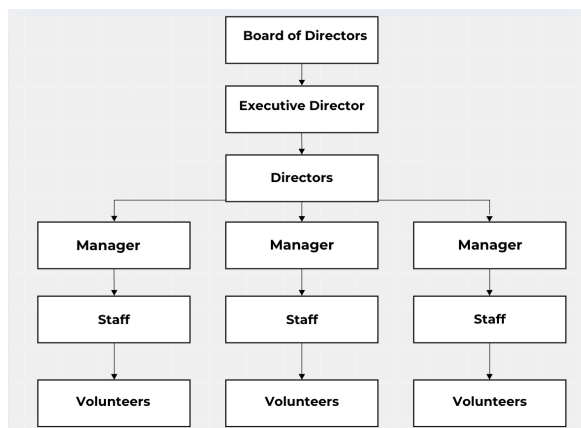
- Community foundations
- Multi-disciplinary meetings
- Make list of all possible partners
- Enter into MOU and Volunteer agreements



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# Program Operations

- Develop org chart
- Develop staff job descriptions
- Develop employee handbook
- Develop program forms
  - Enrollment and consent forms
  - Baseline assessments
  - Workshop sign in logs
  - Surveys and questionnaires
  - Etc.



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# Income & Sustainability



## Developing fundraising plan = Securing revenue from:

- Individuals (cash, product or service donations)
- Corporations
- Private Foundations
- Fee for Services
- Memberships
- Fundraisers
- Bequest

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American Red Cross (Example)

The screenshot shows a webpage with the URL 'redcrosslegacy.org/how-you-can-give/giving-through-your-estate'. The main image features a green military-style vehicle on the left and a white American Red Cross van on the right, parked on a street with debris in the background. The title 'Giving Through Your Estate' is overlaid on the image.

A gift from your estate enables you to achieve financial and tax goals, as well as benefit the mission of the the Red Cross.

**Bequests**

A charitable gift from your estate is a favored method of giving that enables you to achieve your financial goals and benefit the Red Cross.

[Learn more »](#)

**Our Recommended Bequest Language**

You may direct all or a portion of your estate to the Red Cross. Here you'll find recommended bequest language for preparing your will or trust. This language will help guarantee your wishes are carried out as you determine them.

[Learn more »](#)

**Beneficiary Designation**

While many assets transfer through a will or trust, retirement plans, financial accounts, and life insurance policies are governed by separate documents. Here you'll find information for making gifts by beneficiary designation.

[Learn more »](#)

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# Months 7, 8 and 9

“Well done is better than well said.”

Benjamin Franklin

- Program Resources
- Program Launch
- Funding
- Professional Development

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## Program Resources & Launch



- Leverage partnerships
- Enlist and train volunteers
- Create list of resources and referrals for your constituents
- Begin program!

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## Launch Your Program

- Launching program vital for funding!
- Think big but start small!



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## Funding and Professional Development

- Implement your fundraising plan
- Apply for funding
- Track program activities
- Engage in professional development



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# Months 10, 11, and 12

“Sometimes, you have to look back in order to understand the things that lie ahead.”

Yvonne Woon

## Assessment Phase

- Organization evaluation
- Board recruitment
- Budgeting

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## Organization Evaluation

- Program evaluation
- Board self-assessment
- Board expansion



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# Board Recruitment

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- Is it time to grow?
- Considerations:
  - Board involvement
  - Board composition



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## Your Board of Directors should include: The “Fundraiser”

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1. Someone who loves meeting new people!



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## Your Board of Directors should include: The “Analytic”

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2. Someone who’s comfortable in business and with finance.



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## Your Board of Directors should include:

### The “Community Connection”

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3. Someone who lives or works in the community you serve.



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# Develop Your Budget

- Budget cycle
- Budget development
- Budget approval



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# Annual Compliance

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# Compliance

- Annual registration fee to the state
- Charitable registration
- IRS 990 – due 5 ½ months after your fiscal year ends.



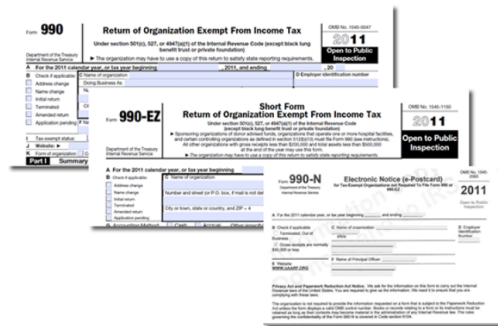
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# IRS Form 990

Unless otherwise exempt, public charities have 3 possible tax filing requirements – based on annual revenue:

- Form 990-N e-postcard (\$50,000 or less)
- Form 990-EZ (\$50,000 – \$200,000)
- Form 990 (\$200,000 or more)

## Required Filings - Form 990 Options



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The Secretary of State

Tennessee Secretary of State Tre Hargett

Businesses Charities Civics Elections Publications Library & Archives Safe At Home Hearings Contact Us


## Charities

Search for Charities Register or Renew a Charity Online Apply for a Gaming Event Search for Gaming Events File a Complaint

How to Use the New Charity & Business Filing System Disaster Relief Fundraising


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Charities News




**SCAM ALERT!**

Secretary of State Tre Hargett Issues New Warning About Mail Scam Targeting Business Renewals




*International*  
**CHARITY FRAUD AWARENESS WEEK**


Secretary of State Tre Hargett Reminds Tennesseans to Give Wisely to Avoid Scams When Donating





**PRESS RELEASE**

Secretary of State Tre Hargett Warns Tennesseans About Donation Scams Claiming to Support Hurricane Victims

Forms  






Guides  


FAQs  


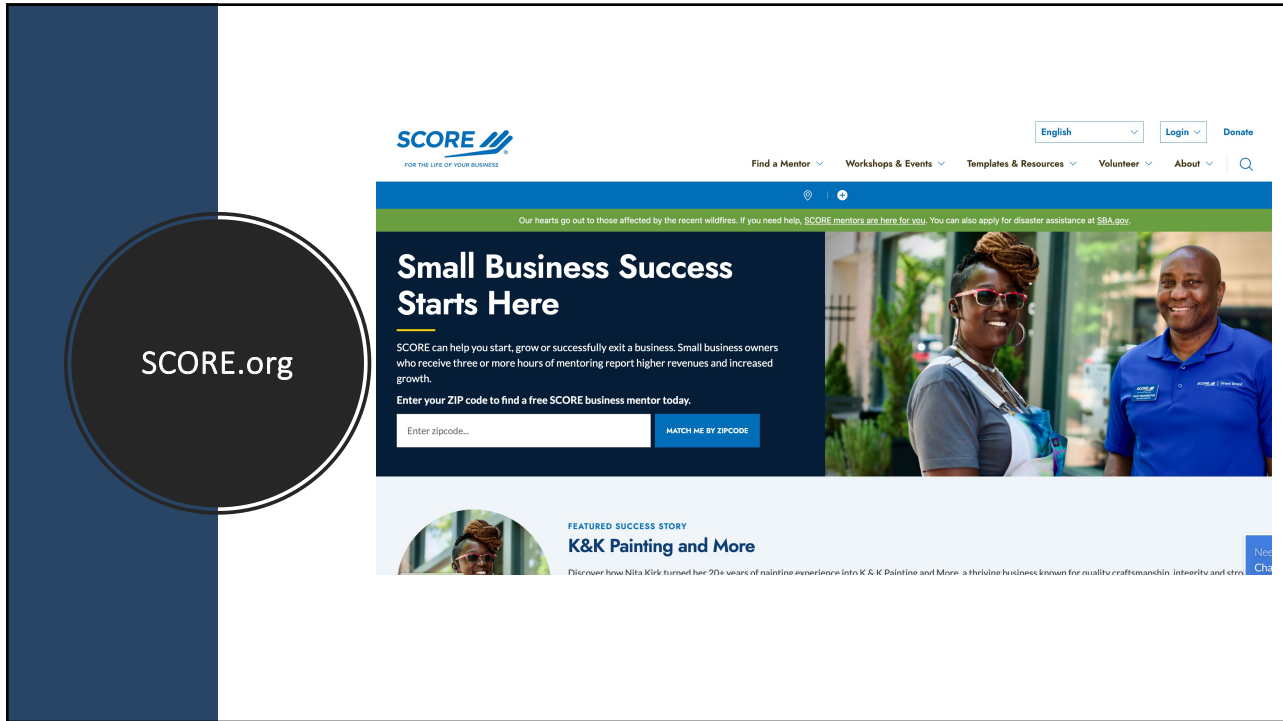
Services  


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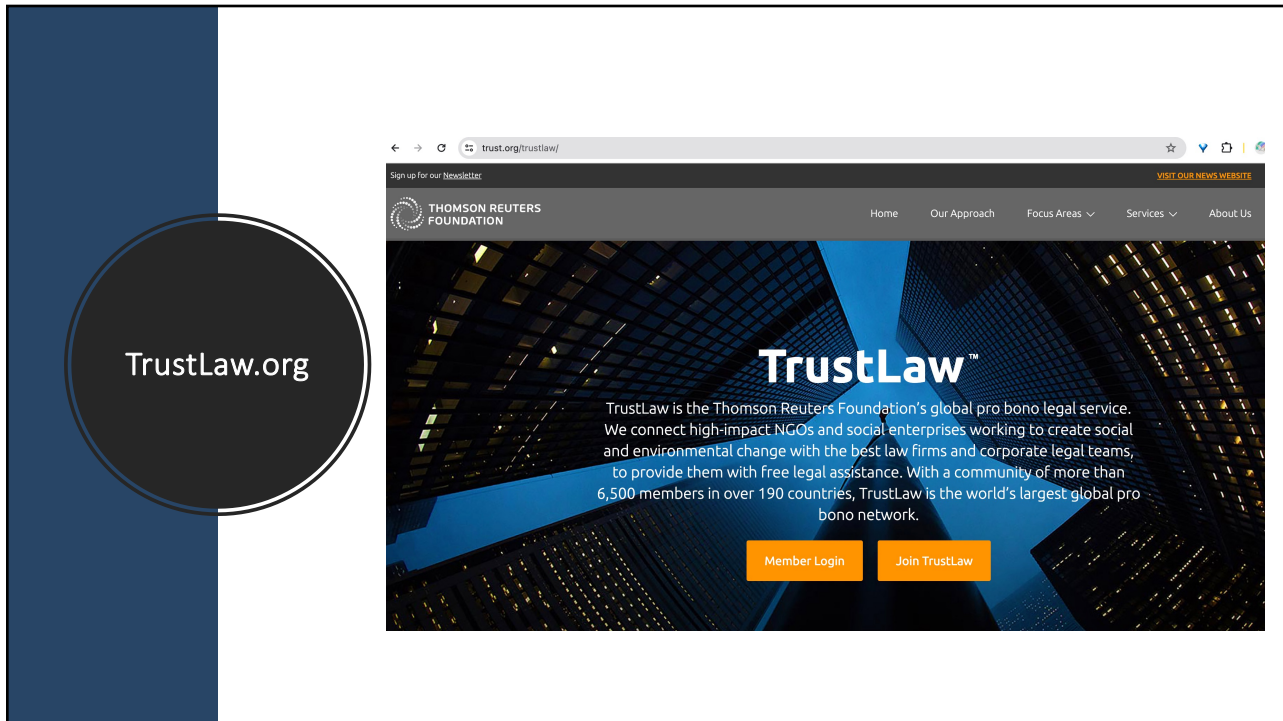
IRS "Staying Exempt"

Action	Course Title	Runtime
	<p><a href="#">Maintaining 501(c)(3) Tax-Exempt Status</a></p> <p>Now that your organization has Section 501(c)(3) tax-exempt status, you should review the activities that can jeopardize your exemption.</p> <p><a href="#">Maintaining 501(c)(3) Tax-Exempt Status</a> <a href="#">PDF</a></p>	30:54
	<p><a href="#">Form 990 Overview Course</a></p> <p>Most 501(c)(3) exempt organizations are required to submit an annual Form 990-series return. This course shows you which forms to file, when they are due, public disclosure of your return and tips to help prepare your form.</p> <p><a href="#">Alternate PDF Version</a> <a href="#">PDF</a></p>	30:54
	<p><a href="#">Employment Issues</a></p> <p>If your organization has employees or volunteers, it may have tax responsibilities. This course explains how to report employee wages and the rules regarding volunteer gifts.</p> <p><a href="#">Alternate PDF Version</a> <a href="#">PDF</a></p>	34:52
	<p><a href="#">Required Disclosures</a></p> <p>Certain organizational records must be disclosed to the public. This course discusses which documents must be provided and the penalties for noncompliance.</p> <p><a href="#">Alternate PDF Version</a> <a href="#">PDF</a></p>	17:41

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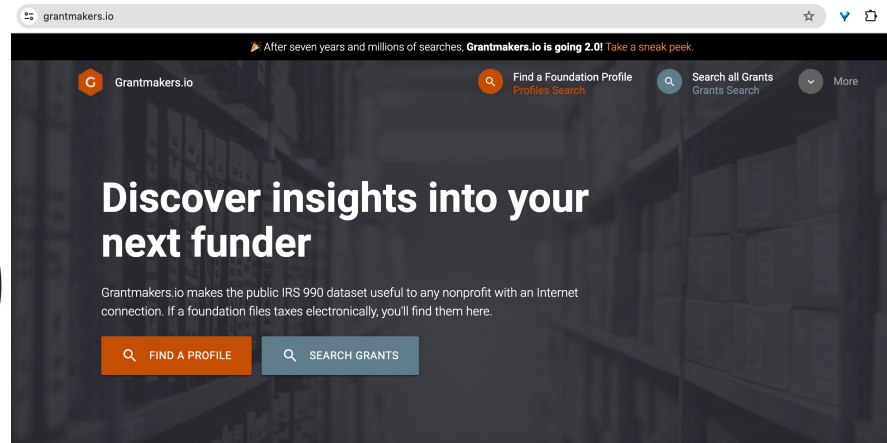


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Grantmakers.io



## Foundation Profiles

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## Nonprofit Support

- The Secretary of State
- IRS "Staying Exempt"
- SCORE
- State Bar / Pro Bono /TrustLaw
- Grantmakers.io
- Paid Professionals:
  - Accounting
  - Training and Development
  - Marketing and Branding
  - Nonprofit Establishment
  - Grant Writing
  - Realtor


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# “You Are” Poem

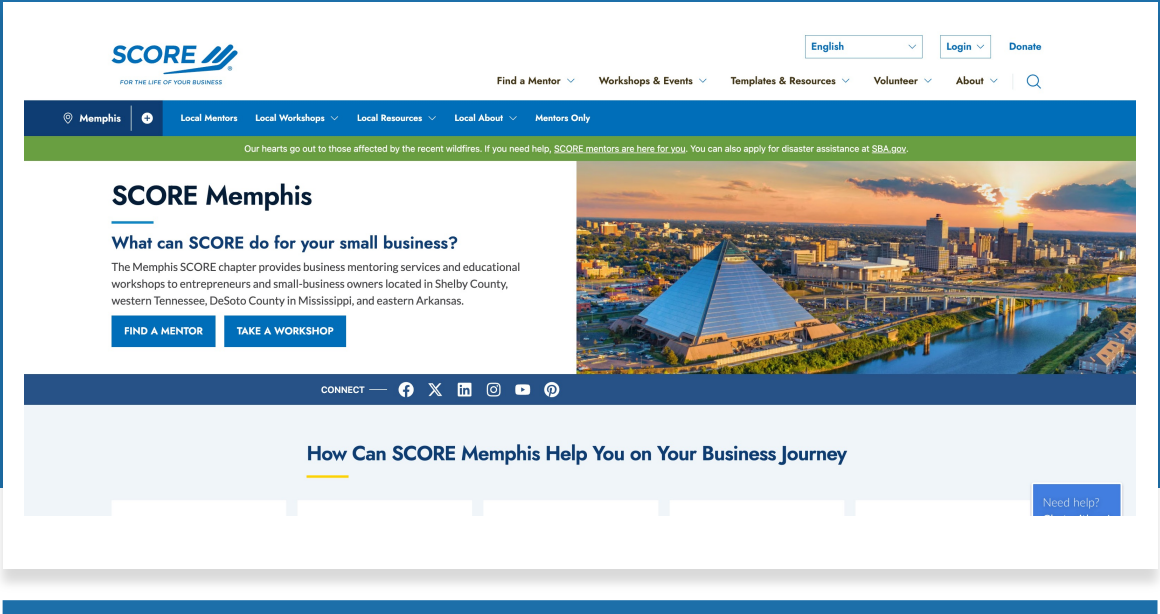
You Are now aware of what to do, and capable of leading those counting on you.  
 You Are a giver of gifts, and you are gifted.  
 You Are an uplifter, and now you are uplifted.  
 You Are in the right place.  
 You Are here for a reason.  
 You Are now entering your abundance season.

1 Year  
=  
365 Opportunitie

Sending you all lots of love and well wishes!  
 Cheryl Smith



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**SCORE** FOR THE LIFE OF YOUR BUSINESS

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Memphis Local Mentors Local Workshops Local Resources Local About Mentors Only

Our hearts go out to those affected by the recent wildfires. If you need help, SCORE mentors are here for you. You can also apply for disaster assistance at SBA.gov.

## SCORE Memphis

**What can SCORE do for your small business?**

The Memphis SCORE chapter provides business mentoring services and educational workshops to entrepreneurs and small-business owners located in Shelby County, western Tennessee, DeSoto County in Mississippi, and eastern Arkansas.

FIND A MENTOR TAKE A WORKSHOP

CONNECT — f X ln @ y p

**How Can SCORE Memphis Help You on Your Business Journey**

Need help?

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Cheryl Smith, CEO  
Dewlyn Nonprofit Services  
National Nonprofit Trainer & Coach

## What I do each day...

1. Establish nonprofit organizations
2. Grant proposal-writing
3. Strategic Planning
4. Group coaching and training



Website: Dewlyn.com  
Email: csmith@Dewlyn.com  
Office: 800-446-0323

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*Thank You!*

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