

# The GLOBE School

## The ABC's of Starting and Managing a Nonprofit

Margaret (Peggy) Sharkey

[www.globeschool.org](http://www.globeschool.org)

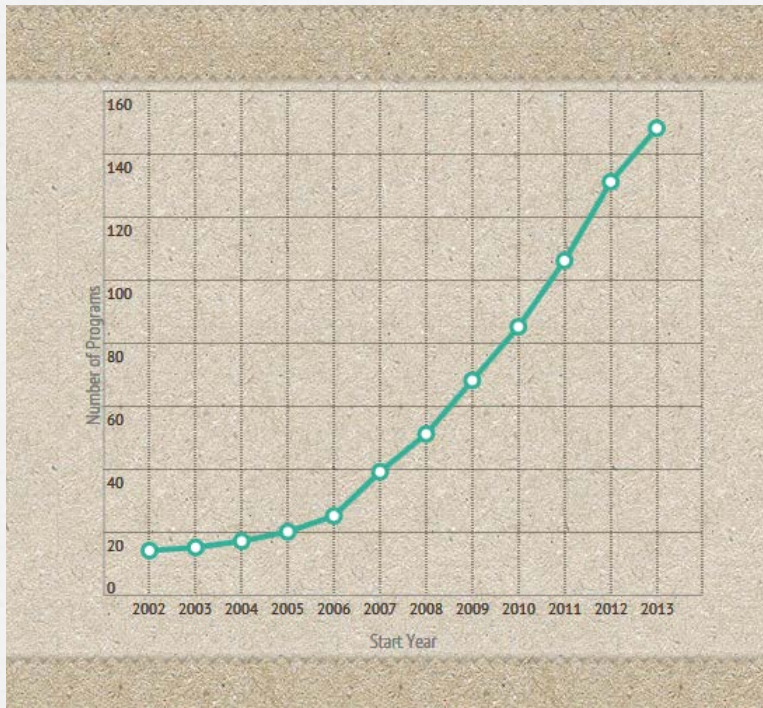
NCLC 2015, Atlanta, GA



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Disclaimer: This information is not intended to replace the advice of a lawyer.

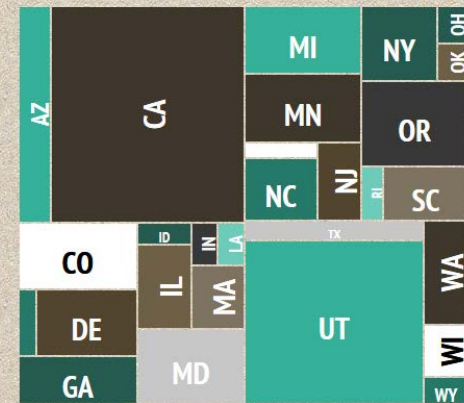
# Program Growth: Good News, Bad News



## CHINESE IMMERSION PROGRAMS IN THE U.S.

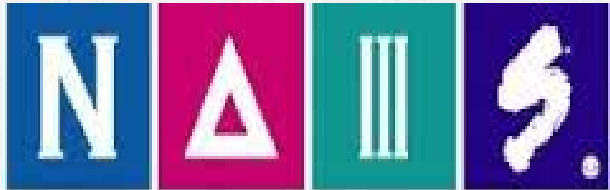
### LOCATION AND GROWTH, 2014

Data Source: Mandarin Immersion Parents Council

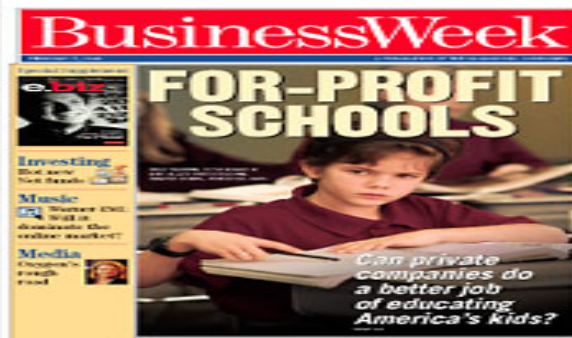


<http://miparentscouncil.org/full-mandarin-immersion-school-list/>  
[https://infogr.am/app/#/edit/psharkey\\_1394388041](https://infogr.am/app/#/edit/psharkey_1394388041)

# Program Development Choices



National Association  
of Independent Schools



<http://www.nais.org/Articles/Pages/Trustees-Guide.aspx?src=audience>

# The Nonprofit Route



Meeting Incorporation Requirements



Applying for 501(c)(3) Status



Managing a Nonprofit Board





# Meeting Incorporation Requirements

Your State Agency: Department of State? Department of Education?

The screenshot shows the IRS website's navigation menu with a search bar. Under the 'Small Business & Self-Employed' section, there is a link for 'State Government Websites'. Below this link, a list of states is provided, each with a bullet point and the state name.

- Alabama
- Alaska
- Arizona
- Arkansas
- California
- Colorado
- Connecticut
- Delaware
- District of Columbia
- Florida
- Georgia
- Hawaii
- Idaho
- Illinois
- Indiana
- Iowa
- Kansas
- Kentucky
- Louisiana
- Maine
- Maryland
- Massachusetts
- Michigan
- Minnesota
- Mississippi
- Missouri
- Montana
- Nebraska
- Nevada
- New Hampshire
- New Jersey
- New Mexico
- New York
- North Carolina
- North Dakota
- Ohio
- Oklahoma
- Oregon
- Pennsylvania
- Rhode Island
- South Carolina
- South Dakota
- Tennessee
- Texas
- Utah
- Vermont
- Virginia
- Washington
- West Virginia
- Wisconsin
- Wyoming

The screenshot shows the Foundation Center website's 'Nonprofit Startup Resources by State' page. It features a map of the United States where each state is color-coded and labeled with a number representing the number of resources available. A search bar is located at the top of the map area. Below the map, there are several links for more information, including 'List All Start-up Guides', 'List All State Agencies', 'List All Nonprofit Associations', and 'List All Legal Resources'. A disclaimer at the bottom states: 'Use your organization's specific services for new or startup nonprofit organizations? Contact us to be considered for inclusion in this listing. Please note that links are limited to nonprofit organizations, government agencies, or organizations that provide substantial resources free of fee to us.'

## Develop Nonprofit Identity and Officers/Trustees

- State Name Requirements; DBA; Logo
- Mission, Vision, Values
- Marketing Materials
- Board Training Infrastructure; Network of Advisors and Volunteers



<http://www.irs.gov/Businesses/Small-Businesses-&Self-Employed/State-Links-1>  
<http://foundationcenter.org/gainknowledge/map/start-up-map.html>



# Meeting Incorporation Requirements

## File Articles of Incorporation and Request EIN

Tax-exempt Purpose Clause (Charitable? Educational?)

Dissolution Clause (Dedicating Assets to another 501(c)(3) Nonprofit)

## Adopt Bylaws, Budget, Policies

Conflict of Interest Policy

Nondiscrimination Policy

## File Applications

Form 1023 for Nonprofit Status



[http://www.irs.gov/Businesses/Small-Businesses-&Self-Employed/Apply-for-an-Employer-Identification-Number-\(EIN\)-Online](http://www.irs.gov/Businesses/Small-Businesses-&Self-Employed/Apply-for-an-Employer-Identification-Number-(EIN)-Online)

<http://www.nolo.com/legal-encyclopedia/nonprofit-corporation>



# Applying for 501(c)(3) Status

## Form 1023

### Prerequisites

Articles of Incorporation with purpose and dissolution clauses  
EIN  
Authorization Documents

### Checklist

Tax-exempt Purpose (Charitable? Educational?)  
Dissolution Clause (Dedicating Assets to another 501(c)(3))

### Interactive Fillable Form

Schedule B. Schools, Colleges, and Universities

The screenshot shows the 'Form 1023 Prerequisite Questions' page on the IRS Stay Exempt website. The page title is 'Form 1023 Prerequisite Questions'. The main text reads: 'This presentation offers information to ensure you have everything needed to apply for tax exemption using Form 1023, Application for Recognition of Exemption, and its associated schedules.' It lists three steps: 1. Answer 5 questions, 2. Download the Form 1023 Checklist, and 3. Download the Interactive Form 1023. A 'Continue' button is visible at the bottom right.

The screenshot shows the 'Form 1023 Checklist' page on the IRS Stay Exempt website. The title is 'Form 1023 Checklist (Revised June 2006)'. It provides instructions on how to assemble the application materials, including the Form 1023 Checklist, Form 2848, Form 5821, and various schedules. It also includes a checklist of items to be submitted, such as the completed Form 1023, EIN, and Schedules A through G. A 'Continue' button is visible at the bottom right.

<http://www.stayexempt.irs.gov/Starting-Out/Interactive-Form-1023-Prerequisite-Questions>  
<http://www.stayexempt.irs.gov/StayExempt/i1023-checklist.pdf>



# Applying for 501(c)(3) Status

## Form 1023

### Application for Recognition of Exemption

- Identification of Applicant
- Organizational Structure
- Required Provisions in Your Organizing Documents
- Authorization Documents
- Narrative Description of Activities
- Compensation and Other Financial Arrangements
- Your Members and Other Individuals and Organizations that Receive Benefits from You
- Your History
- Specific Activities
- Financial Data
- Public Charity Status

### Schedule B. Schools, Colleges, and Universities

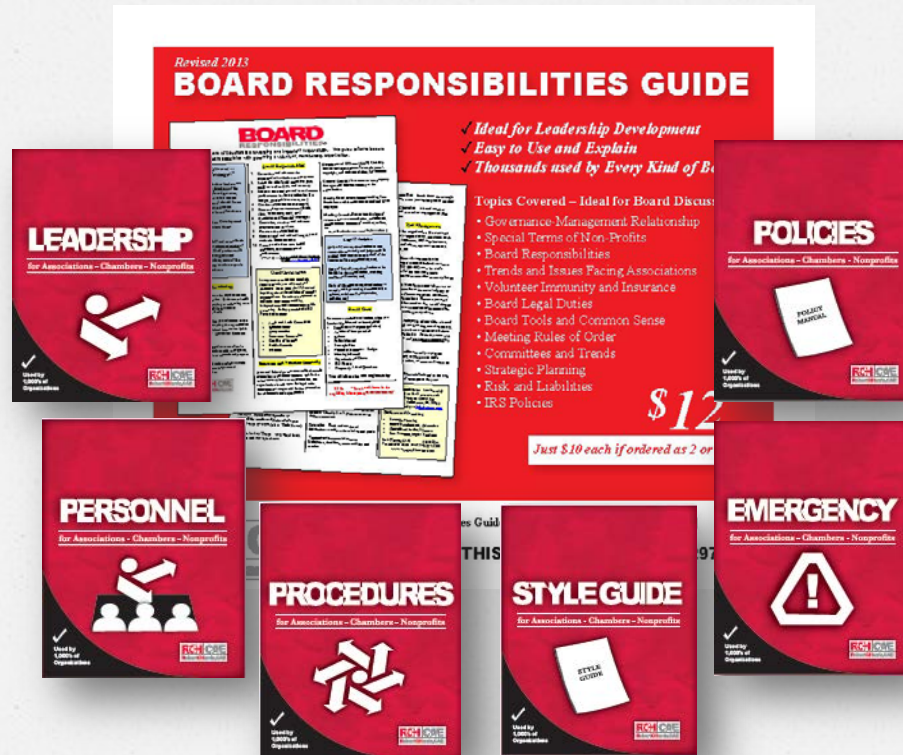
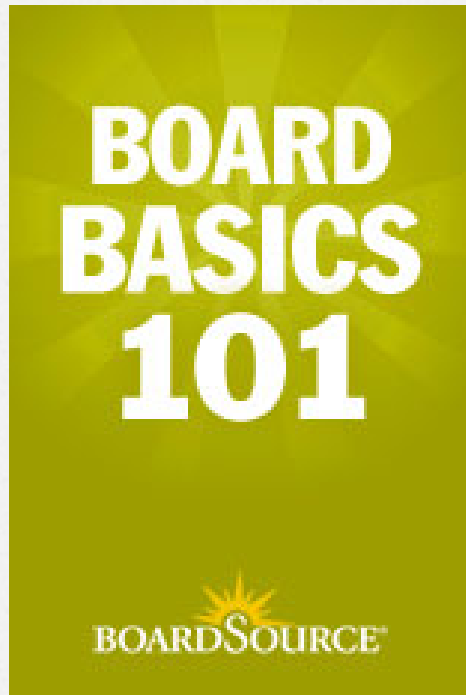
- Operational Information
- Establishment of Racially Nondiscriminatory Policy







# Managing a Nonprofit Board

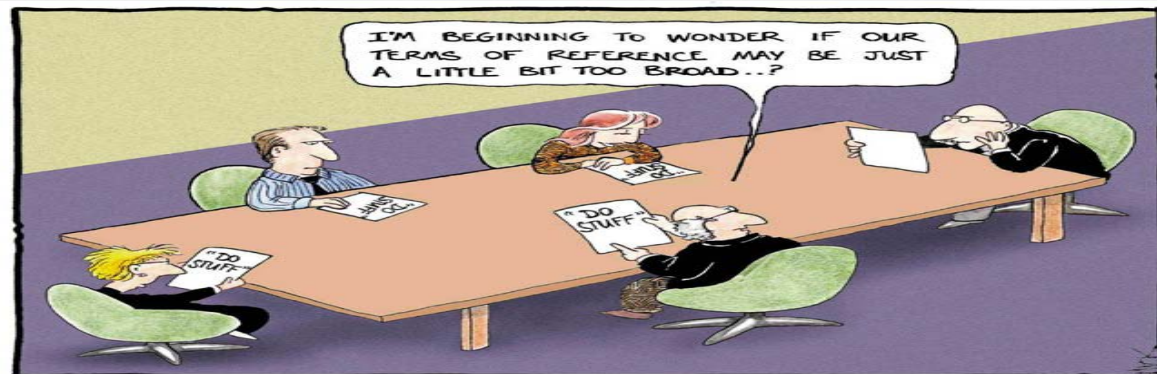


<http://www.boardsource.org>  
<http://www.rhcae.com/books-products/>



# Basic Principals of Governance

- **Duty of Care**
  - Practice good business judgment at all times
  - Practice due diligence in decision making
- **Duty of Loyalty**
  - Act in the best interest of the organization
  - Avoid conflicts of interest
- **Duty of Obedience**
  - Be faithful to the mission and goals
  - Follow the governing documents



# Just the Beginning!

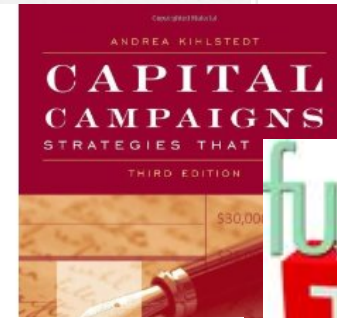
- Business Plan Generation
- Fan-raising and Fundraising
- School Development and Management

You're holding a handbook for visionaries, game changers, and challengers striving to defy outmoded business models and design tomorrow's enterprises. It's a book for the...

## Business Model Generation

WRITTEN BY  
Alexander Osterwalder & Yves Pigneur  
CO-CREATED BY  
An amazing crowd of 4,100 plus thinkers from 45 countries!  
DESIGNED BY  
Peter Hutterli, Reinforcement

BUSINESS MODEL CANVAS				
KEY PARTNERS	KEY ACTIVITIES	VALUE PROPOSITION What is the bundle of benefits offered?	CUSTOMER RELATIONSHIPS	CUSTOMER SEGMENTS
	KEY RESOURCES		CHANNELS Customer touch points that play an important role in the customer experience	
COST STRUCTURE			REVENUE STREAMS	



Authenticity is at the heart of successful fundraising.

asking matters

**fundraising SUCCESS**

Building Blocks

Whether you're looking for a major-gifts officer or a wagon trainer, having clearly defined qualifications makes your task easier.

TEAM

buildinggenerosity.com

Additional Resources: <https://www.pinterest.com/globaissance/nonprofit-resources/>