Resilia

Back to Basics: Creating a Compliant and Strong Foundation for your organization

The "Musts"		Inside Tips and Tools
Establishing your organization	☐ Form your **board** ☐ Establish your **mission** ☐ **Incorporate** in Florida as a nonprofit corporation ☐ Obtain a **nonprofit EIN** ☐ File a **1023** or **1023EZ** with the IRS for your 501(c)(3) tax-exempt determination	Board Recruitment Strategies & Processes In Florida, when applying for your Incorporation, you will need to apply via mail to include language required by the IRS for tax exemption, or file an amendment to add it if you do incorporate via an online filing. The below must be included as a part of your articles of incorporation to meet these IRS guidelines • "The corporation is organized exclusively for charitable, religious, educational, or scientific purposes under Section 501(c)(3) of the Internal Revenue Code, or corresponding section of any future federal tax code. Upon the dissolution of this corporation, assets shall be distributed for one or more exempt purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code, or corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government, for a public purposes." When it comes to the 1023, be sure to complete the eligibility worksheet to determine the correct application for you). All applications are now completed online and you must create a pay.gov account to apply.
Year One Basics	☐ Establish your **bylaws.** ☐ Establish a **conflict of interest policy.** ☐ Set your **board meeting calendar** for the year. Be sure to keep records of all board meeting minutes. ☐ Complete your **Solicitation of Contributions Registration** (required in FL for most nonprofit organizations). ☐ Apply for **state tax exemptions**.	Learn more about what should be in your bylaws here Use this exercise to make decisions about your bylaws with your board.* Use this template as a starting point for creating your bylaws Use this template for creating your conflict of interest policy Application for a Consumer's Certificate of Exemption, form DR-5 (Not-for-profit corporations are subject to corporate income tax. However, a not-for-profit corporation that is exempt from federal taxation under Internal Revenue Code section 501(c)(3) is only required to file a Florida corporate income tax return (Form F-1120) if it has unrelated business income or it files federal Forms 990-C or 990-T with the Internal Revenue Service.)
Annual Filings	☐ **IRS 990** (990-N, 990-EZ) File your **Florida Annual Report**, due May 1. ☐ File **renewal of Solicitation of Contributions Registration**, due on the anniversary of your initial filing	Choosing the Right 990 for You Tax Form 990-N and step by step guide* Tax Form 990 EZ Information Tax Form 990 Information 990s are due the 15th of the 5th month after the close of your fiscal year, May 15 for most organizations

*denotes a Resilia resource available only on paid plans or sponsored by a funder

Resilia

The "Even Better Ifs"		Inside Tips and Tools
Strengthening Foundation	☐ Establishing **Financial Policies** ☐ Creating an **Annual Budget Plan** ☐ Adopting a **Code of Ethics Policy** ☐ Creating **Strategic Planning** Document ☐ Creating an **Annual Fundraising Plan**	Learn the basics of Nonprofit Budgets Budgets for Nonprofits: Putting it All Together* Sample Year over Year budget Code of Ethics Policy* Strategic Planning Readiness Checklist Getting Started with Strategic Planning Strategic Plan Template How to Build a Fundraising Strategy* Fundraising Plan Template*
Building from the Board up	☐ Having a clear understanding of **Board Member Resumes and Affiliations**. Creating and sharing Board member biographies ☐ Establishing **Board Roles and Responsibilities**, with attention to the strengths that each member has to offer ☐ **Evaluating Board Performance**	Board Application & Agreement Board Management Best Practices* Board President Job Description Board Vice President Job Description Board Treasurer Job Description Board Secretary Job Description Individual Donor Development for Board Members Board Member Performance Evaluation*

*denotes a Resilia resource available only on paid plans or sponsored by a funder