New Non-profit? Start Here...

Business Basics

First things first - business startup.

Nonprofits are businesses. You will need to register as a business in your state, and then apply to the IRS for an Employee Identification Number. Only then, will you be ready to apply to the IRS for tax exempt status. (which allows donations to be tax deductible, and allows you to buy equipment, etc. without paying sales tax) Need help? Call SCORE or the Don Ryan Center for Innovation. They have experienced mentors who can walk you through the whole process.

Invest in a good board. You need bylaws, which are the rules for board members. Boards are not just like-minded friends. Ideally, board members are not afraid to ask questions that lead to stronger mission and impact. The key is risk management - and you will need input from experts with legal, insurance, and human resources experience. Here's a list of things to consider from the Council of Non-profits.

State of South Carolina Charity Registration **-** this is required of all organizations that ask for donations, even if already approved by the IRS. Also register any raffles at this site. Consultants (like me) also have to send them a list of all organizations who hire them. Not in South Carolina? Check for your state's registration requirements here.

File your 990-EZ tax return **with the IRS** - Probably you received less than $50,000 last year - so you can file the 990-EZ online. Charities post their 990 on their website for donors to find, even though the IRS also posts it, as does Guidestar/Candid (see below). This builds trust with donors, that you are "legit."

Track income and expense. Many new non-profits lean on the board treasurer to help them manage cash flow. Many grant making foundations will request an audit as part of your grant application. At the least, you will want some way (Quickbooks? Zipbooks is free.) of tracking income and expense-- and processes surrounding the handling of donations and expenditures. And be able to produce a balance sheet and profit & loss statement.

Organization Tools

Tools to help share your mission.

Candid/Guidestar profile- they pull EINs from the IRS database – so you already have a profile on Candid if you have been approved as a 501c3 charity by the IRS. Claim your profile, and provide some basic information so funders can find you. (See the Guidestar package on our Services page.) Many foundations, financial planners and donors use Guidestar/Candid to get data on your work -- and decide if they will fund you.

Charity Navigator also reviews nonprofits. They only rate larger nonprofits with $1M+ in revenue, so you don't have to worry about it if you are small. Still, they base their profiles on information publicly available, so make sure you have information for them to see on your website, etc.

Identify what you do – and whom you serve. How is your non-profit making an impact today? What is the need you serve? Community Foundation of the Lowcountry has a terrific needs assessment that can help you pinpoint how your mission can help those in need. If you do not have any programs yet for people, you can make advocacy a program (letting people know the need is good for fundraising) and also resources and links to other nonprofits you partner with. Looking for evidence-based programs to start? Try this site from Arnold Ventures. People have a hard time giving without seeing an impact TODAY, and how you are different from other organizations.

Fundraising is a team sport - and your board is your team leadership. Board member and nonprofit leader trainings: Non-profit Ready is free - and the trainings are solid. You can learn for free what best practices look like. You can sign up for my newsletter as well. Bloomerang (see below) also has FREE webinars on ALL things non-profit fundraising.

Community Foundation of the Lowcountry grant opportunities: This great organization offers non profit capacity grants to pay for consultant services. You will have to attend their next grant application information session in order to apply, and I know others who have had solid help from their friendly staff. They want nonprofits to succeed! (And, at the information session, you will see many other grant opportunities!) (Not in the Lowcountry? Find a local community foundation here.)

Tools & Services

Fundraising services that WORK!

GiveButter is a FREE online donation platform. They do ask donors for optional "tips" in the free option - which is how they keep it free. See if perhaps that can help you – their options include an online donation page, text-to-give, DAF widgets and event/auction support. There are TOO MANY donation services out there - but this one is pretty functional. For donor tracking systems that are paid, I recommend Virtuous or Bloomerang.

Website: Make sure that your donation link is in the menu for your website - preferably a big button in the top right corner – in color! Don't forget to put the profiles and testimonials you post on social media on a page of your website. Need a website? I recommend Squarespace for a WYSIWYG site. Keep in mind that grant funders may go to your website to verify information, or even to find out more. Your site should avoid exaggerating impact, or a confusing array of (not quite ready for prime time) programs. Stick with the one or two programs you are already doing and share real time data about results.

Canva is a graphic design software that is FREE for all nonprofits - just sign up with your EIN. They verify your tax exempt status, and then you get Canva Pro for FREE! You can even create a brand logo and colors kit – they explain how!

On social media, make sure that you create a profile for your Non-profit - not your personal one. In general, on social media, I recommend you post items that help people LEARN about your work, make them LAUGH, or that they just LOVE. Avoid controversy, for your audience. (This link to Hootsuite has great tips for social media for non-profits.)

Giving Tuesday is December 2, 2025. Make use of Giving Tuesday support - and test and re-test the link to your giving portal. Giving Tuesday has Canva post templates. And your friends can email their friends to give.

Let's strategize to get all the money you are leaving on the table.

Work With Me