

# Starting a Nonprofit Checklist

All good nonprofits start off with a good idea – and a unique idea. Begin your process by learning more about the nonprofits currently serving your geographic area, your targeted client base and your program specialty. You may learn that another nonprofit is already pursuing your idea and that you can join their effort.

**When starting your nonprofit, this checklist offers a useful set of questions for you to consider when beginning the process:**

- Has a unique name been selected? You can go online to [www.sos.state.tx.us/tac/index.shtml](http://www.sos.state.tx.us/tac/index.shtml), email [corpinfo@sos.state.tx.us](mailto:corpinfo@sos.state.tx.us), or call (512) 463-5555 to check if a name is available.
- Have you completed and submitted Form 202? Forms are available from the Texas Secretary of State. Forms must include Purpose of Limitation clause and Dissolution clause.  
[http://www.sos.state.tx.us/corp/forms\\_boc.shtml#rrn](http://www.sos.state.tx.us/corp/forms_boc.shtml#rrn)
- Have IRS Publication 557, Tax-Exempt Status for Your Organization, Form 1023 and instructions, Form 872-C, and Form 8718 been obtained from the IRS ([www.irs.gov](http://www.irs.gov))?
- Has a federal employer identification number (EIN) been obtained from IRS (on line at [www.irs.gov](http://www.irs.gov) or fax Form SS-4 to 1-866-816-2065)?
- Has a mission statement been developed which clearly defines the purpose of your organization in terms of why you exist and who you serve?
- Has a narrative of your services been developed which describes what services you provide, how they are delivered, to whom, by whom and where?
- Has a board of directors been established?
- Have by-laws been developed?

- Do you intend to engage in political activities or lobbying as part of your services?
- Have the sources of funds and volunteers been identified?
- Has a plan for fundraising been developed?
- Has paid staff, if any, been hired?
- Have all those with special interests and relationships been identified?
- Will you engage in unrelated activities which will generate revenue?
- Has a financial history (3 years) and projection been developed and a balance sheet prepared?

**If you are interested in attending one of our Starting a Nonprofit Orientations, please visit our online Training Page at:**  
**<http://uwsmithcounty.org/our-trainings/>**  
**to register for our next available orientation.**