



HERO WORKS

www.K9HeroWorks.com // Info@K9HeroCards.com

NON-PROFIT SETUP CHECKLIST

We're here to help with as much or as little as you need.

1. Build organization identity framework (Statement of Purpose materials)
2. Write a cohesive mission statement
3. Officialize a name for the non-profit
 - a. Include business entity compliance and best practices
4. Design a logo
 - a. Ensure full editability with industry-standard vector-based filetypes
 - b. Include assorted versions for multi-platform and layout consistency
 - c. Include supplementary branding package (graphics/colors/fonts/textures/etc)
5. Select a registered agent and legal professional (if separate)
6. Select founding board members
 - a. Include 3 necessary director roles
7. Write comprehensive bylaws
8. Write conflict of interest policy
9. Hold the first board meeting
 - a. Approve all necessary foundational motions
10. Open all necessary banking accounts and establish digital payment systems
11. Setup selected bookkeeping software/processes
12. File Articles of Incorporation
13. Apply for an EIN
14. Apply for Federal Tax Exemption Status
15. Apply for State Tax Exemption Status (as needed)
16. Apply for charitable solicitation
17. Register with your state's agency for Lottery Charitable Gaming



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18. Determine and prepare for state-specific annual reporting requirements
19. Setup social media accounts
 - a. Prepare a collection of ready-to-use posts
20. Establish social media presence guidelines and parameters
21. Select and establish a non-profit member for social media lead
22. Write and collect backgrounds/bios/media for all pertinent non-profit members
23. Acquire written permission of use for all necessary agency logos/property (including likeness of K9s, vehicles, employees, etc.)
24. Purchase a URL
25. Setup emails for all necessary individuals
26. Design a website
 - a. Include Primary Pages - Home, About, Donate/Sponsorship, Contact
 - i. Include supplementary primary pages – Donation Received, Transaction Cancelled, Thank you for ____, etc.
 - b. Include Agency Relationship Definition, clarifying non-profit is a separate entity
 - c. Include Standby Pages - Programs/Fundraising, Sponsors, Media, Events
 - d. Ensure future editability with industry-standard design boundaries
 - e. Included links all available social, donation, event, etc platforms
 - f. Include transparency policy and list of summary of exclusions to non-profit goals
27. Create community and donor demographic analysis
28. Write introductory donation-sourcing letter
29. Establish fundraising goals
 - a. Outline 6-month, 12-month, 24-month goals
 - b. Determine and finalize initial startup campaigns
30. Design initial fundraising campaign materials
 - a. Ensure campaign direction and visuals match with demographic analysis
 - b. Include small-large ranges of achievable campaign goals



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31. Write charitable donation receipt letter
 - a. Define and implement bulk corporate introduction campaign
32. Build demographic analysis-driven selection of fundraising concepts
 - a. Diversify achievability for short and long term campaigns
 - b. Include fundraising opportunities that:
 - i. Allow community members to take lead/heavily participate
 - ii. Can be hosted by/at the agency
 - iii. Can be hosted by/at a local business/venue
 - iv. Involve local extracurricular/social groups
 - v. Can take place online
 - vi. Require a minimal number of non-profit members to operate
 - vii. Focus on broad and local events and holidays
33. Design and collect fundraising booth/table materials for easy setup
34. Write volunteer liability waiver
35. Host an initial non-profit event
36. Setup and begin meet-and-greet campaigns
37. Establish an organized easy-to-access library of photo/video/media for use in future designs/campaigns/social media
38. Sign up for Amazon Smile and similar programs
39. Establish small-scale passive donation processes in the community
 - a. Applying the demographic analysis
40. Begin outreach to connect and collaborate with local/regional K9 groups and specialists