

## QUESTIONNAIRE FOR POTENTIAL NONPROFITS

Prepared by The Community Tax Law Project

Creating a nonprofit requires passion about your mission and a great deal of hard work. The questions asked on this form will assist you in thinking about how you will structure your organization and provide the services to achieve your goals. While the information requested may seem extensive, some of this information is required by the IRS in order to apply for tax exempt status. If you cannot answer most of these questions, you may not yet be ready to make application.

Name of your organization: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_

Where did the idea for your program come from? \_\_\_\_\_

\_\_\_\_\_

Have you incorporated your organization?       Yes       No

If yes, what is the date of incorporation?

Have you drafted bylaws for your organization?       Yes       No

**If you have them, please provide your legal counsel with a copy of your articles of incorporation and bylaws. You must attach a copy of your articles and any bylaws already adopted to your IRS Form 1023, the application for tax exemption under Section 501(c)(3) of the Internal Revenue Code. (See [www.irs.gov](http://www.irs.gov) "Charities and Nonprofits" tab.)**

Has your board of directors held its first meeting and adopted the bylaws?       Yes       No

If you have **NOT** incorporated:

Have you decided how your organization will be operated? Who will run the organization? What will each individual's responsibilities be? Please be as detailed as possible.

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Do you have a mission statement?  Yes  No

**If not, you will need to write one. The Form 1023 application requires a thorough and accurate description of your organization's past, present and planned activities.**

Have you developed a business plan for your organization?  Yes  No

What types of services will your organization provide? \_\_\_\_\_

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How will you administer these services? \_\_\_\_\_

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Will you limit your services to a particular group of people?  Yes  No

Which groups will receive your services? \_\_\_\_\_

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How will you determine if an individual qualifies for your services? What will be your eligibility process?

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Are you aware of any other organization in your area that is providing the same types of services or conducting the same types of activities that you plan to conduct?

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If yes, have you spoken with any of these organizations to discuss how you will avoid duplicating services?

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Are you currently providing services to your target population?     Yes         No

What services are you currently offering?

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How will your organization be funded? \_\_\_\_\_

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Do you plan to seek grants for your organization?         Yes         No

From whom do you plan to seek grants? \_\_\_\_\_

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Please provide a detailed description of how you will raise funds.

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Have you established a budget for your organization?  Yes  No

Please provide a detailed description of your actual or projected budget for the current year and projected budgets for the next two years \* How much do you expect funds/donations to be? How much do you expect your expenses to be? It is often helpful to set up a spreadsheet for this type of information. We strongly suggest reading over the section in the IRS Form 1023 to see the budget categories for which actual figures or best estimates must be provided.

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\* This information is **required** on the Form 1023.

Have you developed any publicity material?  Yes  No

**Please provide your legal counsel with a copy of any brochures, flyers or other literature you have developed.**

Who will run your organization? For example,

Will you have salaried employees? \*  Yes  No

Will any board members be paid for their services? \*  Yes  No

\* The Form 1023 application requires this information, including actual or estimated salary and payment figures.

Will you have volunteers?  Yes  No

How will you recruit volunteers? \_\_\_\_\_

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Have you applied for and received an Employer Identification Number (EIN)?  Yes  No

**You must have an EIN before filing the Form 1023. You may apply for the EIN online from a link on the IRS. (See [www.irs.gov](http://www.irs.gov) “Charities and Nonprofits” tab.)**

Do you have an office?  Yes  No

Please add any other information you think would be helpful for your legal counsel to know about your organization.

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