Beyond the Mission Statement
Financial and Marketing Startup Overview

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Martha Stone-Martin
VP Marketing and Administration
Charles River CFO | mstonemartin@crcfo.com

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Great Idea, Now What?

- Check out web for resources "How to Start a Nonprofit"

- Refer to ClassACT webinars "Creating a 501(c)(3)" and "A Ten-Point Plan for Building a Board of Directors"

- Register with your state

- Develop a strategic plan, expect it to evolve

- Add as much detail as you can for fundraising, program development, volunteer recruitment, and community outreach

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Financial Management

- Implement sound financial management practices

- Develop a budget

- Monthly reports

- Define internal controls and understand compliance

- Excel/Google Sheets is fine to start then Quickbooks

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Understanding Income

- Donations

- Grants

- Earned income

- Can be restricted

- Allocate expenses and portion of overhead to grants

- Regular reconciliation

- Annual IRS Form 990 for tax exempt organizations with >$200K receipts

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Fundraising

- Friends and family

- Small group introductions

- Grants

- Joint events with community partners

- Annual campaigns

- Regular donor connection

- Shift to pledge based … consider Benevon model

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Financial Management
Key Performance Indicators

- Donation $ and growth

- Fundraising ROI

- Cash flow

- Operating surplus/deficit
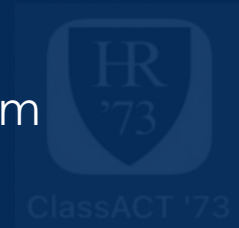
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Marketing

- Communication and connection

- Go back to strategic plan and understand audiences

- Refine mission to "elevator pitch"

- Try ChatGPT

- Use Board of Directors to reach audience initially

- Open up a Gmail account and forward

- Register domain (godaddy.com)

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Brand Elements

- Logo

- Graphics, font, color, tagline

- Color ideas

  - allies4good.org/color-psychology-for-nonprofits/

  - coolors.co

- Consider upwork.com or 99designs.com

- Style guide with all assets

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Website

- Content, design, functionality

  - Sitemap

  - Develop 10 key phrases for SEO to guide copy development

  - Design elements, logo, colors, photos

  - Free photo services, pexels.com and unsplash.com

  - Note attrition

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Platforms

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HOME   What is ClassACT? ▸   50th Reunion And Beyond ▸   Our Work ▸   Forums, Webinars, Learn at Lunch ▸   Upcoming ▸   Get Involved ▸

- Website:

  - Wordpress. WPengine.com $20-30/month + $50 template + help

  - Wix: $15-$20/month

  - Wild Apricot: $140 for 500 contacts with all functions

- Email tool: Mailchimp / Constant Contact: $15-20/month

- Database: Google / Excel / Wild Apricot

- Social: ClassACT webinar

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And More

- Upwork.com for resources

- Expect to pay $1000 - $5000 for website

- Webmaster and backup

- Privacy and cookies: termly.io (start with free version)

- **Mass Nonprofit Association** (massnonprofit.net)

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Community Engagement

- Social media listening

- Ask leaders who they recommend you connect with

- Listening tour

- Communicating impact… data, data, data

- Create volunteer opportunities

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Marketing
Key Performance Indicators

- Web visitors

- Social analytics

- Email list size and opens

- Event attendance

- Volunteer metrics

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Discussion

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