



9 FOR 90

Toolkit for the first
3 months and beyond


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December 9, 2020
Drury MNCL

TABLE OF CONTENTS



1	Preserving Nonprofit Status & Annual Requirements
2	Policies & Procedures
3	Financial Skills & Reporting
4	Onboarding Strategies
5	Fundraising Regulations
6	Running a Lean Nonprofit
7	Crisis & Contingency Planning
8	Media Relations
9	Leadership Decision Fatigue
	Competency Checklist
	References



NONPROFIT STATUS



AND ANNUAL
REQUIREMENTS



9 FOR 90 TOOLKIT

ANNUAL CHECKLIST TO REMAIN IN GOOD STANDING

1

Items to Locate

- ☐ Articles of Incorporation
- ☐ Organizational Bylaws
- ☐ 501 Letter
- ☐ State Tax Exempt Certificate
- ☐ State Registration Report
 - ☐ Recent 990 Filings

Annual Checklist

- ☐ File IRS Form 990
- ☐ Secretary of State Registration Report
- ☐ Reporting Annual Changes
- ☐ W-9
- ☐ Annual Board Meeting
 - ☐ Budget Approval
 - ☐ New Members
 - ☐ New Officers
 - ☐ Policies and Procedures
- ☐ Grant & Contracts Reporting
 - ☐ Many government and non-government grants require the recipient of the funds (you, the nonprofit organization) to report on financial and program activity. Some require periodic reports; others require year-end reports. Some are narrative in description (what you did with the funds, who you served, progress towards meeting objectives, etc.); others are financial in nature (profit/loss, budget to actuals, etc.). The donor wants to know how the funds were used. Review the terms of such grants and complete those reports

2

MUST-HAVE POLICIES FOR NONPROFITS

- Conflict of Interest Policy
- Whistleblower Policy
- Document Retention and Destruction Policy
- Financial Management Policy
- Personnel Policy
- Solicitation & Acceptance of Gifts Policy
- Volunteer Policy
- Industry/Organization Specific Policies

Find Samples and Guidance from Board Source & Council of Nonprofits

Learn more here: *What Governance Policies Should your Nonprofit Have?*



3

FINANCIAL SKILLS



AND REPORTING



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ARE YOU READY TO TALK FINANCES WITH YOUR BOARD & TEAM?

3

Executive Directors need a daily working knowledge of the following:

- Bookkeeping
- Budget
- Monthly Financial Statements
- Audit Reports
- Financial Management Policy
- Potential for Abuse & Error

Feeling overwhelmed by financials? Reach out and ask for help. Find a training, a mentor, or a board member willing to teach.

Learn more here:

A Picture Book of Nonprofit Financial Statements by Thomas R. Ittelson

10 STEPS OF GREAT GAME IMPLEMENTATION



- 1 Begin with the Right Leadership**
If you're not prepared to learn, teach, share, and be involved, The Game will not work for you.
- 2 Share the Why Before the How**
People get much more excited about the How when they clearly understand the Why.
- 3 Open the Books**
Take it beyond just sharing numbers and begin to build trust and mutual respect through transparency and education.
- 4 Focus on the Critical Number™**
Define the win – and get clarity on what's most important and critical to success.
- 5 Act on the Right Drivers**
Create line-of-sight and ask people what they can do today to make a difference.
- 6 Create an Early Win – MiniGames™**
Give people a chance to win early and win often.
- 7 Provide a Stake in the Outcome®**
Define 'What's in it for me' and communicate, communicate, communicate.
- 8 Keep Score**
Are we winning or losing?
- 9 Follow the Action**
Develop a communication rhythm and hold each other accountable for results.
- 10 Apply High-Involvement Planning™**
People support what they help create.

Learn more here:

The Great Game of Business for Social Sectors, www.greatgame.com/socialsectors



4

ONBOARDING STRATEGIES



FOR THE FIRST
90 DAYS



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ONBOARDING STRATEGIES

Starting a new job can be exciting and even seen as a fresh start, but it's also a critical time for leaders. Transitions can put new leaders into a position of vulnerability and missteps during the first three months can detail success. This guide helps navigate challenges new leaders face when transitioning into a new organization.

Preparation

Getting up to speed faster and smarter in the first 90 days of a new position is a strong predictor of success in any new job. Your transition begins the moment you know you're being considered for the new leadership role. Use this time to learn as much as you can about the organization.

Once you've secured the job, start planning specific milestones of what you hope to accomplish by the

- End of Day 1
- End of Week 1
- End of Month 1
- End of Month 2
- End of Month 3

Four pillars of effective onboarding

1) Business Orientation

The sooner you understand the organization, the sooner you're able to contribute to success. It's essential to learn and understand all parts of the organization, not just your own role.

2) Stakeholder Connections

Identify key stakeholders early and work to build productive working relationships.

3) Expectations Alignment

Expectations may have changed between your hire and your start date. Make sure you check and recheck what's expected of you once you formally join the organization.

4) Cultural Adaptation

Once you join the organization, take some time to observe and learn the culture of the organization including the behavior patterns such as dress codes or how to get support for initiatives. Every workplace has organizational norms that become evident only after spending some time with the organization.

Assess your vulnerabilities

When it comes to problem-solving, it's human nature to focus on what you know. As a new leader, this can create imbalance and leave you vulnerable. Take time to look at what has made you successful in your career and evaluate what critical skills you need to develop in order to

ONBOARDING STRATEGIES

create balance. Be sure to build a network of those who are strong in the skills you lack so you can learn from them.

Learn to listen, and listen to learn

Failing to learn leads to uninformed decision-making and can undercut credibility. It's imperative to make a plan to listen and learn.

Here are some key questions to guide your learning process:

Past

- What does past performance of the organization look like?
- What are the root causes for the good/bad outcomes?
- What is the history of change with the organization?

Present

- What is the current vision and strategy for the organization?
- What are the challenges it currently faces?
- What are the current processes and potential landmines?

Future

- What are the challenges and opportunities for the organization?
- What are the barriers and resources?
- What should be the culture of the organization?

As you begin to learn the organization, identify key sources for the knowledge you're seeking. Hard data is always good, but you will need soft data as well. These sources can be other staff members, board members, clients, or even donors.

Early Wins

Securing early wins is crucial, but what's more important is how you secure them. Here's some tips on how to succeed when looking for those early wins:

- Focus on only a few promising opportunities. Taking on too much during your first few months can be disastrous.
- Seek early wins that matter to your board. This helps build credibility and access to resources.
- Get wins in the right way. Early wins seen as manipulative or underhanded will only cause you trouble in the long run.

ONBOARDING STRATEGIES

Build credibility with your team

Good or bad, your team will form opinions about you before they even know you. Your early actions will shape their perceptions.

Credibility will depend on how your team would answer the following questions about you:

- Do you have the insight and steadiness to make tough decisions?
- Do you have values that they relate to, admire, and want to emulate?
- Do you have the right kind of energy?
- Do you demand high levels of performance from yourself as well as others?

Build Your Team

Assess existing team members to see what changes need to be made. Next, devise a plan for hiring new people as well as moving people into the right positions. During this process, be careful not to do too much damage to short-term performance.

When building your team, avoid these common traps:

Criticizing previous leadership.

This gains you nothing. However, it doesn't mean you accept poor performance or can't highlight opportunities for improvement.

Keeping the existing team too long.

Establish deadlines for yourself to reach conclusions about your team and taking action within your first 90 days.

Not holding onto high performers.

Uncertainty about who will and will not be at your organization can lead your best people to move on. There are constraints on what you can say regarding personnel, however, you can still look for ways to signal to your top performers that you recognize their capabilities.

Trying to do it yourself.

Restructuring staff is fraught with legal, emotional and policy complications. Find an advisor to help you chart a strategy.

Manage yourself

Transitions tend to amplify your weaknesses and take you off track. Assess your vulnerabilities and take stock of the following behaviors:

Undefended boundaries

Defining what you will or will not do to the people around you is highly important. If you cannot establish boundaries for yourself, you cannot expect others to do it for you.

ONBOARDING STRATEGIES

Isolation

It's very easy for new leaders to end up isolated, however, to be effective, you must be connected to your team. Isolation can breed uninformed decision making and ultimately damage your credibility.

Work Avoidance

Do not avoid hard decisions. All leaders will need to make tough choices early on and avoiding them results in the problems becoming worse.

This was a quick look from 50,000 feet at some proven strategies that can help you make the most of your first 90 days as a leader.

Learn more here:

The First 90 Days by Michael D. Watkins from Harvard Business Review Press, 2013



5

FUNDRAISING REGULATIONS



FOR NONPROFITS



9 FOR 90 TOOLKIT

FUNDRAISING REGULATIONS

What many new nonprofit leaders don't know is that fundraising is an IRS-regulated activity. Not following rules and regulations can cost the organization money in fines and taxes. Here are important facts that all nonprofit leaders need to know about fundraising.

Unrelated Business Income

Unrelated business income (UBI) happens when a tax-exempt charity earns income through an activity not related to its exempt purposes (like the selling of goods) and/or the activity happens on a regular basis. UBI revenue is taxable for nonprofits. It's important to note that it doesn't matter if the income is used for mission-related purposes, it's the activity that generated the revenue that matters.

3-Part Test for UBI

- 1) Does the income come from a trade of business (for sale of goods or services)?
 - a. If yes, it's UBI
- 2) Does the incoming-producing activity happen on a regular basis?
 - a. If yes, it's UBI
- 3) Does the business and/or activity significantly relate to the organization's exempt purpose?
 - a. If no, it's UBI

In-kind donations

Many charities rely on in-kind donations – gifts of an item(s) or time – and must follow government regulations when accepting these as well. If donation is valued at \$250 or above, the nonprofit must provide a written statement that describes the in-kind donation as well as its monetary value to the donor.

Gaming activities or “games of chance”

If you plan to hold a Bingo Party or Casino Night, be aware that special rules exist for gaming activities. It's important to know your state's rules to avoid penalties. In the United States, 41 states including Missouri, require licenses for some “games of chance” fundraisers.

In addition to rules for the organization hosting the event, winners may also owe tax that the nonprofit is required to withhold.

Donation receipts

Written records verify gift was made to organization with proper legal status such as a 501c3

In United States, written records needed for gifts of \$250 or more in order for the donor to claim tax deduction. Although donation receipts for all gifts are a best practice.

FUNDRAISING REGULATIONS

Donation receipts must include:

- Name of organization
- Donor name
- Cash contribution amount
- Description of any non-cash contribution (if applicable)
- Description and estimated value of goods or services that the organization provided in return
- Statement that any goods or services that the organization provided in return consisted entirely of intangible religious benefits (if applicable).

Good stewardship tip: Always include personal thank you with donation receipt.

Learn more here:

Personify: Wild Apricot, 5 Nonprofit Fundraising Laws You Should Know About

<https://www.wildapricot.com/blogs/newsblog/2020/05/01/nonprofit-fundraising-laws>

Board Effect, Fundraising Rules and Regulations for Nonprofit Organizations

<https://www.boardeffect.com/blog/fundraising-rules-regulations-nonprofit-organizations/>

National Council for Nonprofits

<https://www.councilofnonprofits.org/tools-resources/unrelated-business-income-taxation>



LEAN NONPROFITS



WHERE TO FIND SAVINGS
FOR THE BOTTOM LINE



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Nonprofit leaders can work smarter and stay lean by taking advantage of discounts and free accounts available to the industry.

Here are places to look for those savings:

TECHSOUP

Tech Soup offers software, hardware, and cloud services at significantly reduced rates for nonprofits.

RETAILERS

Nonprofits can obtain a lot of services free or at a significantly discounted rate. All you have to do is ask and be prepared to prove your nonprofit status. Here are some services offering free or discounted rates: Canva, Office 365, MailChimp, Slack, Asana, Trello, Zoom, and Eventbrite ... just to name a few.

SALES TAX

Make sure you aren't paying sales tax when purchasing products for your organization. Online and in-person retailers like Amazon, Walmart, Sam's Club, Staples, and other larger retailers will set up tax-exempt accounts for nonprofits.

VENDORS

Some vendors offer discounting services for nonprofits including insurance and human resources benefits.

INTERNSHIPS

Students are always looking to get "real" experience, so offering internships helps nonprofits get work done while giving student the experience they're looking for.

VOLUNTEERS

Most nonprofits are understaffed and overworked, so volunteers can offer much-needed hands and feet for organizations.

INVENTORY

Maximizing inventory, space, people, and resources ensure good stewardship as well as financial sustainability.



CRISIS & CONTINGENCY

PLANNING FOR
NONPROFITS

9 FOR 90 TOOLKIT

Contingency Planning

Contingency planning helps organizations identify business critical operations, potential threats to critical resources, and plan to respond to different scenarios. Contingency planning allows businesses to review the impact of an unexpected (and often unwanted) event and develop predictable and quantifiable solutions to those situations. This contingency planning is designed to not only help an owner plan for impacts to the organization, but also allow for the owner to utilize and engage the team to create develop the plan, create buy in on the plan, and implement the plan.

STEP 1: Identify the Situation and the Impacted Business Functions

When identifying a specific situation that needs to have a contingency plan, determine which of the critical business functions will be impacted. There are 4 critical business functions that could be impacted by any given situation:

Financial

Financial impacts include those that affect your profit, cash, return, and growth.

Marketplace

Marketplace impacts include those that affect your brand, industry, value proposition, market share, or target client.

Operations

Operational impacts include those that affect your production, quality, inventory, supply chain, and standard operating procedures.

People

People impacts include those that affect your workforce, leadership, and human capital.

STEP 2: Pinpoint the Highest Risk

Organizations need to determine what the threats are to business-critical resources. Then, determine the biggest areas of risk for your organization and begin to build the plan for that risk. For example, if you are in manufacturing and outsource materials, a big risk for you might be a disruption in the supply chain. By identifying this as one of the highest risks in your company, you can build a plan to mitigate the impact on your organization. The chart below is an example of some of the potential risks in each critical business function.

Critical Business Function	Potential Risks
Financial	Revenue, Profit, Cash Flow, Other (stocks, value, debt)
Marketplace	Recession / Depression, Industry changes, Competition, Brand Awareness
Operations	IT, Access to Information, Inventory, Supply Chain, Production, Quality
People	Communications, Workforce, Experience / Expertise, Key Employees / Management



STEP 3: Drafting the Plan

The chart below will walk you through creating your contingency plan. Additionally, ensure that you include key employees in the creation of the plan, and have those employees help you implement the plan. Once the situation is described and the risks are identified, the plan will focus on the following areas:

Risk Mitigation

These are actions that can be taken prior to the situation occurring to reduce or eliminate the risk or to minimize its impact. This may include thing like buying insurance, re-writing some policies or procedures, and researching alternate supply chain resources or vendors.

Action Plan / Initial Responses

These are actions that will be taken during the onset of the situation. This may include cutting costs and implementing a communication / PR plan.

Ongoing Response / Milestones

As the situation progresses, you will need to take additional actions as you track the situations impact on your critical business functions. It is often helpful to establish milestones on key metrics to help you determine your response. For example, if revenue drops below a certain point, then you will implement additional cost cutting measures and eliminate overtime.

Champion

The champion is someone who will lead and facilitate the project but doesn't necessarily do all the work. The champion can pull together a team to help them solve the issue, delegate tasks, and overall makes sure things are moving forward.

Situation Description:

Describe the situation for which you are working to develop a contingency. Then work through the chart to determine next steps and an action plan.

Critical Business Function	Identified Risks	Risk Mitigation (Prior to the situation)	Action Plan / Initial Response (During the situation)	Ongoing Response / Milestones (As the situation progresses)	Champion
Financial					
Marketplace					
Operations					
People					



STEP 4: Distributing the Plan

Contingency plans are best implemented when the entire organization knows and understands the plan and knows how they as departments and individuals will contribute to the plan.

Be Honest and Open

We know that it might not be prudent to tell all the employees everything. But be as open and honest as you can with the current situation and current plan. Allow people to ask questions and allow yourself and other leaders to say, “I don’t know yet, but I will let you know when I do know something”.

Increase the Communication Cadence

In times of uncertainty it helps everyone to remain calm and aligned if there are regular touchpoints. This means that as the situation changes there might be weekly, or even daily, updates and information. You cannot over communicate.

Align Leadership

It is important that employees are hearing the same message and plan from all leaders. Ensure that leaders understand and have buy-in on the plan and understand that their job as managers is to properly disseminate this information to their team.

Practice Grace

When change is happening, people tend to experience a wide variety of emotions. Be patient with your team, hear concerns and offer guidance and redirection. Coach your team to see the situation for what it is and guide them to solutions. You don’t have to have all the answers. Sometimes just listening to concerns is enough.

STEP 5: Identify Opportunities

In every change there is a chance for opportunity. Look for the opportunity in all situations and try to determine if you can leverage the new position that this change has placed you in. For example, the situation might give you the chance to work on a process that has been challenging you for a while. It could give you the opportunity to innovate and switch gears to focus on a project that you have wanted to work on. Take time to bring your team together and brainstorm ideas for leveraging the situation!



Example Contingency Plan

Situation Description:

A recession in the United States is anticipated within the next six months and is anticipated to last an entire year, as such we believe that our sales revenue could be up to 50% less than previous year.

Critical Business Function	Identified Risks	Risk Mitigation (Prior to the situation)	Action Plan / Initial Response (During the situation)	Ongoing / Milestones Response (As the situation progresses)	Champion
Financial	Decreased Revenue, and impaired cashflow	Line of Credit, Focus on Accounts Receivable, increase savings	Cut Unnecessary Expenses	20% drop of revenue: Freeze Travel, Eliminate Overtime, Reduce Owner draw 35% drop of revenue: Reduce executive pay by 25% 50% drop of revenue: Reduce workforce by 20%	CFO
Marketplace	Industry-wide impacts	Build a marketing campaign before competitors, add value to product, focus on recession proof customers, focus on existing clients	Increase marketing, including hand-to-hand marketing and guerilla marketing		Marketing Director and Sales Manager
Operations	Supply chain interruption	Research alternate vendors Improve process to reduce production time		Gross Margin less than 25%: Increase price of product	
People	Workforce, Employee Morale	Clarify job descriptions, evaluate organizational chart, conduct employee one-on-ones	Share Contingency plan with workforce, Implement the plan, Increase communication cadence	Weekly/Daily Updates	COO





8

MEDIA RELATIONS



TIPS FOR
LEADERS



9 FOR 90 TOOLKIT

10 TIPS TO GREAT MEDIA RELATIONS

1) Build Relationships

Relationships are vital to media relations. Relationships are long-term and shouldn't be built for one particular campaign or immediate focus. When you build relationships with your media contacts, it's likely that they will be more receptive to your pitches down the line.

Ways to build these relationships include following them on social media, dropping them an email even when you don't have an idea to pitch them, or meeting them for coffee or lunch – just don't purchase their coffee or lunch as journalists see this as unethical and don't want to appear biased.

2) Let Media Get to Know You

You should always be accessible to the media if you want to build those relationships. You can invite them to events, give them an inside look at what your organization does in the community, or just involve them into the regular communications of your organization. A really good way for media to get to know you is through your organization's social media accounts, so be sure to your organization is active across your channels.

3) Be Strategic

When possible, avoid the blanket approach to sending out news releases. Most reporters cover specific topics for their media outlet (i.e.: education, nonprofit, government). Build lists of media contacts based off what they cover so you can be strategic about who you send pitches to according to what your pitch is about.

4) Know the media's schedule and use it

Sending news releases or calling while your media contacts are in a meeting, on deadline, or on-air increases the chances of your communication getting lost in the shuffle. Most media organizations hold meetings both in the morning and in the afternoon to discuss the news they will cover for the day. Knowing when these meetings happen as well as times for on-air newscasts and deadlines for stories will help your communication get to the right person in a timely manner.

Speaking of a timely manner – it's imperative that you return calls from the media as soon as possible after you get them. Reporters have deadlines and you can't wait to get back with them as you might lose your chance to tell your story or communicate your message. With the race to get the story on the internet, turnaround times could be just a few hours or even minutes depending on what the topic.

5) Anticipate media's needs

When sending out a news release, you should always include or be ready with anything the media will need to cover your story. Those needs include:

- Background information on the topic or person your pitch is about
- Visuals – images, logos, and ideas for video footage (make sure all images are high-resolution)
- Make sure a spokesperson (ideally, the person you've highlighted in your release if applicable) is available for interviews.

10 TIPS TO GREAT MEDIA RELATIONS

6) Truthful and Transparent

Don't exaggerate and don't guess if you don't know something. When you're asked a question that you don't know the answer to, say you don't know but you will find the answer and get back with them. Then, make sure you get back with them as soon as possible – remember Tip #4 regarding the media's deadline.

If you're not able to speak on a topic you're asked about, best practice is to say that and give an explanation if possible. For example: "I can't speak to that because it's a personnel matter."

7) Make it Easy

In your communication to the media, be clear about what you're asking. Don't make them guess or wade through a lot of unnecessary clutter to get to your message.

When you send releases, do the work for the media. A well-written news release using Associated Press style has a good chance of getting posted on a media outlet's website just as it is. This is best-case for your organization as you are controlling your message. Another tip: don't just attach your release to an email, make sure you paste it in the body so it's easy for the reporter to cut and paste.

8) Keep your Promises

If you've said you will release information at a certain time, then do it. If a reporter requested information and you said you'd get back with them, then do it. Not keeping your promises is a very quick way to hurt valuable relationships with the media.

9) Media Train

Before you need someone to speak to the media, be sure you train them on the best practices. Here are some tips for preparing someone for an interview:

- Be prepared with three main talking points and if the reporter asks a question not related to your message, steer them back to your three points
- Avoid long answers and talk in sound bites around 5-10 seconds
- Always avoid "no comment." Even if you can't speak on something, say that you can't speak on it (refer to Tip #5)
- The "mic is always on," and never say anything that you wouldn't want repeated
- Practice, practice, practice

10) Use your own channels to share news

You are your organization's best reporter. Post your news releases or stories on your website. Share your news through all your social media channels. Not only will you spread your message, but media outlets watch social media for story ideas, too.

Learn more here:

BusinessWire, <https://blog.businesswire.com/the-2020-list-of-media-relations-best-practices-blog-posts>



MINIMIZING DECISION FATIGUE



Tips for leaders

- Admit the problem
- Allow for important decisions to be made at the beginning of meeting agenda
- Take short mental breaks
- Give time to process
- Encourage staff to play Devil's Advocate
- Know what winning looks like

COMPETENCY CHECKLIST



New leaders should use this competency checklist along with the toolkit to demonstrate skill level when beginning your new role, after 30 days, after 60 days, and after 90 days. Additionally, this self-assessment can be used with a board to encourage dialogue about expectations, identify gaps in development and plan professional training where needed. The blank spaces allow for leaders to add their own identified competencies needed for their organization.

9 for 90	Core Competency	I am an expert	I have some knowledge	I know nothing	Next Steps
1	How to keep nonprofit in good standing with IRS				
2	What policies are recommended for nonprofits				
3	Bookkeeping				
3	Budgeting				
3	Financial Statements				
4	Onboarding strategies for new leaders				
5	Fundraising regulations for nonprofits				
5	In-Kind donations				
5	Donation Receipts				
6	Running a lean nonprofit				
7	Crisis and contingency planning				
8	Media Relations				
9	How to minimize decision fatigue				

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