

**Business Plan Template for Nonprofits**

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For questions or a business plan review for Northern Utah nonprofits (Ogden to Logan), reach out to:

**Mark Atkinson**

Nonprofit Connection Director

matkinson@uwnu.org

**A note to aspiring or current Northern Utah nonprofits**

If you're thinking about starting a nonprofit in Northern Utah—or you've already taken the leap—you clearly have a generous heart. That passion is a powerful foundation, but it's not enough on its own to build a successful organization.

To thrive, your Northern Utah nonprofit must run like a business—and the strongest businesses begin with a solid plan.

Developing a well-thought-out business plan takes weeks or months and involves considerable effort. If you’ve already registered your nonprofit, that’s okay but the work will still need to be done to achieve sustainability. That’s why we recommend creating a well-developed plan.

We’re here to help you with our services during the process. Let’s build something great—together.

**Business Plan**

**[Nonprofit’s Name]**
Date:
Prepared By:

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# 1. Executive Summary

* **Mission Statement**
What is your purpose?
* **Vision Statement**
What future do you aim to create?
* **Primary Funding Sources**

List at least three funding sources from section 3’s Funding Plan.

* **Summary of Programs/Services**
Brief overview of what you offer or plan to offer.
* **Legal Status**
e.g., 501(c)(3) status in progress, incorporated in Utah, etc.

# 2. Purpose and Services

Explain what you intend to offer your area and why it must be done.

* **Background and History**
What are you planning to contribute to the world. Why? How do you know the world wants and needs it? National data is often not useful for local nonprofits. Use information from your current region.
* **Location and Service Area**
Where will you serve? Include counties, cities, neighborhoods, etc.
* **Founders and Leadership**
List key people and their roles other than just board members.
* **Competitive and Alliance Analysis**

Starting a new nonprofit isn’t always the most effective or sustainable path. Here are smart **alternatives** for someone who wants to further their mission-driven work without creating a new organization:

* Partner with Existing Nonprofits: Join forces on events, programs, or advocacy. Use their reach and infrastructure.
* Use a Fiscal Sponsor: Operate under an established nonprofit’s 501(c)(3) status to raise funds and run programs.
* Start a Social Enterprise: Launch a mission-driven business (e.g., LLC or B Corp) that supports your cause through services or products.
* Create a Program Within an Organization: Pitch your idea as a new initiative inside a nonprofit, school, or agency.
* Apply for a Fellowship or Incubator: Get funding, mentorship, and structure to develop your idea without starting a nonprofit.
* Use Digital Platforms: Run campaigns, fundraisers, or education projects via YouTube, Patreon, Substack, etc.
* Join a Network or Collective: Collaborate with others to increase impact without creating new overhead.

# 3. Revenues Plan

Developing a robust revenues portfolio is essential for a nonprofit's long-term success. It's not just about securing immediate funds, but about strategically diversifying your revenue streams to ensure long-term sustainability and growth.

**Create a plan with a few sources then delete the rest.**

Avoid over-reliance:

* + Aim for no more than 25–30% from any one category
	+ Monitor and adjust your funding mix annually
	+ Build a reserve fund with surpluses from multiple sources

**Elements of Portfolio**

1. ***Individual Donations***

* Annual Giving (recurring or one-time)
* Major Gifts (high-net-worth donors)
* Monthly Sustainers
* Online Appeals (email, social media, crowdfunding)
* Planned Giving (bequests, legacy gifts)

***2. Grants***

* Private Foundations (e.g., local, family, or national foundations)
* Corporate Foundations (e.g., Walmart Foundation, Google.org)
* Government Grants
* Federal (e.g., NEA, HUD)
* State & Local Agencies
* Donor-Advised Funds (DAFs)

***3. Corporate Sponsorships & Partnerships***

* Event Sponsorships
* Program Support
* Cause Marketing Campaigns
* In-Kind Donations (products or services)

***4. Earned Income***

* Program Fees (sliding scale, full pay, scholarships)
* Product Sales (merchandise, curriculum, books)
* Consulting or Training Services
* Social Enterprises (e.g., thrift stores, cafés)

***5. Events & Fundraisers***

* Annual Galas
* Walks/Runs/Bike-a-thons
* Benefit Auctions
* Peer-to-Peer Campaigns

***6. Memberships & Subscriptions***

* Member Dues
* Educational or Professional Memberships
* Subscription-Based Content or Access

***7. Investment Income***

* Endowment Earnings
* Interest from Reserve Accounts
* Dividend or Rental Income (if applicable)

***8. Religious or Affiliated Institution Support***

* Church or Denominational Support
* University- or Hospital-Affiliated Funding

***9. Crowdfunding & Micro-Donations***

* One-time Campaigns (e.g., GoFundMe, Givebutter)
* Recurring Campaigns (e.g., Patreon, Ko-fi)

***10. Fee-for-Service Contracts***

* Government Contracts
* School Districts, Municipalities, Healthcare Systems
* Corporate Clients

# 4. Evaluation and Impact

In concert with a Revenues Plan, measurable outcomes are vital for demonstrating impact and potentially securing funding. Focus on a simple, focused plan; overcomplicating can weaken your proposal.

**Create a plan with a few outcomes then delete the rest.**

Tips for Crafting Strong Outcomes:

* **Align with Funder Priorities:** Research the grant maker’s mission and tailor your outcomes to their goals.
* **Focus on Change:** Outcomes describe the results of your activities, not just the activities themselves.
* **Be Measurable:** Include specific numbers, percentages, or qualitative indicators.
* **Utilize a Logic Model:** Clearly articulate the relationship between your inputs, activities, outputs, and outcomes.
* **Provide Baseline Data:** Show the situation before your intervention to highlight anticipated change.
* **Explain "How":** Briefly describe your methods for achieving and measuring each outcome.
* **Connect to Community Needs:** Articulate how your outcomes address specific needs in Northern Utah, supported by local data.
* **Realistic and Achievable:** Ensure outcomes are ambitious yet attainable within the grant period and requested resources.

**Programmatic/Direct Impact Outcomes**

* **Increased Access/Participation:**
	+ Number of individuals/families served.
	+ Percentage increase in participation from target demographics (e.g., low-income families).
	+ New partnerships to expand reach.
* **Improved Knowledge/Skills:**
	+ Percentage of participants showing increased knowledge (e.g., financial literacy), measured by pre/post-tests.
	+ Number of participants completing training or certification.
	+ Demonstrated improvement in specific skills (e.g., reading levels).
* **Behavioral Change:**
	+ Percentage of participants adopting new, positive behaviors (e.g., increased physical activity).
	+ Decrease in negative behaviors (e.g., truancy rates).
	+ Increased community engagement.
* **Improved Well-being/Quality of Life:**
	+ Percentage of participants reporting improved physical or mental health.
	+ Increased self-sufficiency or economic stability.
	+ Reduced instances of homelessness or food insecurity.
	+ Improved academic performance or school attendance.
* **Community-Level Change:**
	+ Reduction in a specific community problem (e.g., crime rates).
	+ Increased community engagement or volunteerism.
	+ Development of new community resources.
	+ Enhanced collaboration among community organizations.

**Organizational Capacity & Sustainability Outcomes**

* **Enhanced Operational Efficiency:**
	+ Implementation of new data management or program tracking systems.
	+ Reduction in administrative costs.
	+ Streamlined service delivery processes.
* **Increased Staff/Volunteer Capacity:**
	+ Number of staff/volunteers trained in new skills.
	+ Improved staff retention rates.
	+ Increased volunteer hours.
* **Improved Financial Health/Sustainability:**
	+ Diversification of funding sources (e.g., new grants, increased individual donations).
	+ Growth in unrestricted operating funds.
	+ Development of a comprehensive fundraising plan.
* **Strengthened Partnerships/Collaborations:**
	+ Formation of new strategic alliances.
	+ Increased referrals with partner organizations.
	+ Joint projects or initiatives with collaborators.
* **Enhanced Visibility & Advocacy:**
	+ Increased media coverage or public awareness.
	+ Growth in social media engagement.
	+ Successful advocacy leading to policy changes.

**Evaluation & Learning Outcomes**

* **Improved Data Collection & Analysis:**
	+ Regular reporting on key performance indicators.
	+ Use of data to inform program adjustments.

# 5. Financial Projections

Use the Nonprofit Connection Financials tool to develop a 3-year cash flow projection and associated balance sheet, that is in concert with your Revenues Plan and Evaluation and Impact planning.

# 6. Board of Directors

Under Utah law (Utah Code § 16-6a), the Board of Directors holds the authority and responsibility to govern the nonprofit corporation. The board ensures that the organization fulfills its charitable mission, maintains legal and ethical integrity, and exercises financial oversight.

**Legal Requirements (Utah)**

* **Minimum of Three Directors:** Utah law requires at least **three** individuals on the board at all times.
* **Officers Required:** At minimum, Utah nonprofits must have a **President**, **Secretary**, and **Treasurer**—roles that may be held by board members or assigned separately.
* **No Residency Requirement:** Board members are not required to reside in Utah.
* **Term Limits:** Term limits may be established in your bylaws but are not mandated by law.

**Suggested Board Structure**

**Executive Roles** *(Required)*

* **President/Chair:** Leads the board, oversees meetings, and represents the organization publicly.
* **Secretary:** Maintains corporate records and minutes of board meetings.
* **Treasurer:** Oversees the financial affairs, including budgeting and reporting.

#### Additional Officers or Directors (Recommended)

* **Vice Chair:** Assists the Chair and may facilitate the Chair is unavailable.
* **General Board Members:** Provide guidance, strategic oversight, and specialized support (e.g., legal, finance, programming, fundraising).

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Occupation / Affiliation | Specialties / Skills | Contact Information |
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# 7. Market Analysis

* **Community Need:**
*How do you know your services are needed? Provide empirical information. National data is rarely useful when providing services within a community.*
* **Target Populations:**
*(Who do you serve? Be specific.)*
* **Existing Services:**
*(Who else is doing similar work, and how are you different?)*
* **Community Partnerships:**
*(Potential or current collaborators.)*

# 8. Marketing and Outreach

Use the template below to create a marketing plan. Keep in mind that “marketing” is research and advertising, not just the latter.

**Use what you need in the template, then delete the rest.**

**Nonprofit Marketing Plan – [Organization Name]**

**Time Frame:** [e.g., July 2025 – June 2026]

**1. Marketing Goals**

* Raise awareness of [cause/mission]
* Increase engagement with [audience: donors, volunteers, partners, etc.]
* Grow attendance/participation in [events, programs]
* Drive traffic to [website/social media]

**2. Target Audiences**

* Donors (match funding plan)
* Volunteers
* Community partners
* Clients/beneficiaries
* Local media & influencers

**3. Core Messages**

* What we do: [One-sentence mission statement]
* Why it matters: [Brief impact statement or stat]
* Call to action: [e.g., “Donate today,” “Join our newsletter,” “Attend our event”]

**4. Key Marketing Channels**

* **Website:** [[www.yourdomain.org](http://www.yourdomain.org)]
* **Social Media:** [List platforms: Facebook, Instagram, LinkedIn, etc.]
* **Email Marketing:** [e.g., Monthly newsletter via Mailchimp]
* **Local Outreach:** [Flyers, community boards, partner orgs]
* **Events & Tabling:** [List major opportunities]

**5. Monthly Activities Calendar (example)**

The example below is for a youth services nonprofit. Create your own and it need not be as sophisticated or busy as the example.

|  |  |  |  |
| --- | --- | --- | --- |
| **Month** | **Focus** | **Activities** | **Responsible Person** |
| **January** | New year goals | Social campaign on youth goal setting, newsletter with impact stories, donor thank-you’s |  |
| **February** | Youth Mental Health Awareness | Share youth testimonials, blog post on services, Valentine’s volunteer push |  |
| **March** | Spring into Action (Volunteer Focus) | Volunteer spotlight stories, video post, tabling at community fairs |  |
| **April** | National Volunteer Month | Launch "Why I Volunteer" social series, thank-you video, email blast to volunteers |  |
| **May** | School Year Wrap-Up | Celebrate student milestones, parent testimonials, promote summer programs |  |
| **June** | Summer Programs Begin | Event promo, photos from day camps, social calendar of activities |  |
| **July** | Mid-Year Impact Report | Share impact metrics, publish a mid-year report, donor appeal letter/email |  |
| **August** | Back to School | Backpack drive, supply giveaway promo, local media pitch |  |
| **September** | Suicide Prevention Month |  Partner content, awareness graphics, live stream with a youth counselor |  |
| **October** | Bullying Prevention & Safety |  Social toolkit for schools, safety tips, community partner shoutouts |  |
| **November** | Gratitude Campaign | “Thankful Thursdays” donor and youth appreciation, Giving Tuesday prep |  |
| **December** | Year-End Giving | Countdown campaign, youth success highlights, tax-deductible donation push |  |

**6. Metrics for Success**

* Increase email subscribers by X%
* Grow social media followers by X%
* Secure $X in new donations
* Reach X participants/attendees

# 9. Operations Plan

**Organizational Structure (example)**

Create an organizational chart.

|  |  |
| --- | --- |
| Position |  Role / Responsibilities |
| Executive Director | Daily operations, program oversight, staff supervision, reporting to the board |
|

|  |
| --- |
|  |

Program Manager | Manages specific programs or services offered by the nonprofit |
| Development Coordinator  | Fundraising, donor relations, grant writing, event planning |
| Administrative Assistant | Office support, scheduling, recordkeeping, basic accounting |
| Volunteers | Support for events, programs, and outreach |

* **Facilities:**
*(Where do you operate? Office? Virtual?)*
* **Technology and Tools:**
*(Software, databases, platforms, etc.)*
* **Policies and Procedures:**
*(Basic HR, safety, or service delivery policies.)*

# 10. Bylaws

Use this sample as a starting point. Consult legal counsel to ensure compliance with your nonprofit's specific mission and needs.

**ARTICLE I – Name and Purpose**

**Section 1. Name**
The name of the organization shall be: **[Nonprofit Name]**. It shall be a nonprofit organization incorporated under the laws of the State of Utah.

**Section 2. Purpose**
This organization is organized exclusively for charitable, educational, religious, or scientific purposes under Section 501(c)(3) of the Internal Revenue Code, or corresponding section of any future federal tax code.
The specific purpose of this organization is:
**[Insert Mission Statement or Primary Activities]**

**ARTICLE II – Membership**

**Section 1. Membership**
[Choose one: “This organization shall have no members.” OR “Membership shall be open to any individual who supports the purpose of the organization.”]

**Section 2. Rights and Responsibilities**
[If applicable, describe voting rights, dues, and responsibilities of members.]

**ARTICLE III – Board of Directors**

**Section 1. General Powers**
The affairs of the organization shall be managed by its Board of Directors.

**Section 2. Number and Qualifications**
The Board shall consist of no fewer than **[3]** and no more than **[15]** members. Directors must be at least 18 years of age.

**Section 3. Term**
Each Director shall serve a term of **[2 years]** and may be re-elected for **[X]** consecutive terms.

**Section 4. Meetings**
The Board shall meet at least **[quarterly/monthly]**. Meetings may be held in person or virtually.

**Section 5. Quorum and Voting**
A quorum shall consist of a majority of the Board. Decisions shall be made by majority vote of those present.

**Section 6. Removal and Vacancies**
Any Director may be removed by a two-thirds vote of the Board. Vacancies may be filled by a majority vote of the remaining Board.

**ARTICLE IV – Officers**

**Section 1. Officers**
Officers shall include a President (or Chair), Vice President, Secretary, and Treasurer. Additional officers may be appointed as needed.

**Section 2. Election and Term**
Officers are elected by the Board for a term of **[1 year]**, and may serve up to **[3]** consecutive terms.

**Section 3. Duties**

* **President/Chair:** Presides over meetings and represents the organization.
* **Vice President:** Assists the President and assumes duties in their absence.
* **Secretary:** Maintains meeting minutes and official records.
* **Treasurer:** Manages finances and prepares financial reports.

**ARTICLE V – Committees**

The Board may establish committees as necessary, including standing or ad hoc committees. Each committee shall have a designated Chair and report to the Board.

**ARTICLE VI – Fiscal Policies**

The fiscal year of the organization shall be from **[Month] 1 to [Month] 30/31**. An annual budget shall be approved by the Board. Financial records shall be reviewed or audited annually.

**ARTICLE VII – Conflict of Interest Policy**

All Board members and officers must disclose any potential conflicts of interest. The Board shall adopt and annually review a formal conflict of interest policy in accordance with IRS guidelines.

**ARTICLE VIII – Indemnification**

To the fullest extent permitted by Utah law, the organization shall indemnify and hold harmless its Directors, Officers, and employees from any and all claims arising from their service to the organization, except in cases of gross negligence or willful misconduct.

**ARTICLE IX – Amendments**

These Bylaws may be amended by a two-thirds vote of the Board at any regular or special meeting, provided that notice of the proposed amendment was given at least **[10]** days prior to the meeting.

**ARTICLE X – Dissolution**

Upon the dissolution of this organization, assets shall be distributed for one or more exempt purposes within the meaning of section 501(c)(3) of the Internal Revenue Code, or to the federal government or a state or local government, for a public purpose. Any such assets not so disposed shall be disposed of by a court of competent jurisdiction in the county in which the principal office of the organization is located.

**CERTIFICATION**

These Bylaws were approved at a meeting of the Board of Directors of **[Nonprofit Name]** on **[Date]**.

**Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
President or Chair

**Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
Secretary

# Appendix

* Resumes of Founders/Board
* Letters of Support (3)
* IRS Documentation (Form 1023 and Form 990)
* Sample Marketing Materials
* Other relevant documents