

After You Form Your Nonprofit

Your Essential Post Formation Roadmap

Introduction: Transitioning from Paperwork to Purpose

Forming a nonprofit is an exciting milestone—but the real work begins afterward. Drawing from the experience of launching 30 nonprofits and serving on 9 boards, Brian Baccus shares the essential steps every nonprofit founder must take post formation to ensure long-term success and impact.

Compliance & Governance Essentials

- Secure insurance through Nonprofits Insurance Alliance (NIA) and complete the 10-hour mitigation plan.
- Document Articles of Incorporation, Bylaws, Conflict of Interest, and Indemnification policies.
- Establish board manuals, onboarding processes, assessments, recruitment strategies, and meeting procedures.

Human Resources & Internal Policy

- Create written HR policies, job descriptions, and orientation processes.
- Implement performance review systems to support staff and volunteers.
- Ensure onboarding processes are consistent and documented.

Program & Service Management

- Provide comprehensive training for staff and volunteers.
- Continuously refine policies and procedures.
- Collaborate with external organizations to enhance service delivery.

Safety, Boundaries & Emergency Preparedness

- Define clear codes of conduct for staff and clients.
- Tailor program boundaries to fit your organization's unique mission.
- Prepare volunteer/staff applications, interview guides, background checks, and facility access protocols.
- Establish emergency procedures, training supervision, and discipline protocols.

Next Steps: Operational Launch Readiness

- Insurance completed
- Governance documentation in place
- Board processes set up
- HR structure ready
- Program protocols established
- Safety & emergency guidelines drafted
- Volunteer/staff onboarding tools prepared

Bonus Resources & Templates

Access downloadable templates for:

- Risk Mitigation Policy
- Board Manual outline
- HR policy template
- Volunteer/staff application forms
- Emergency procedures worksheet

Closing: Empowering Your Nonprofit to Thrive

While forming a nonprofit is a major achievement, implementing these post formation systems will create the backbone for sustainability and community impact. For personalized support, reach out to Brian Baccus Brands or connect via Altadena Talks.

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