STARTING A COMMUNITY-BASED ORGANIZATION

A Step-by-Step Strategic Planning Workbook

Donna Ewing Marto · LUV Solutions

Version 1.0 · September 2026 · Review Copy

“Never doubt that a small group of thoughtful, committed citizens can change the world. Indeed, it's the only thing that ever has.”

— Attributed to Margaret Mead

Read, write in the spaces, and return to earlier answers as your thinking develops.

Why This Workbook?

Lessons from the Family & Youth Roundtable

The Family & Youth Roundtable of San Diego County began with a small group of people and grew to receive local, state, and national recognition. Its work brought people receiving services together with community organizations, public agency leaders, and researchers. Together, they created opportunities for families and youth to have a say in the services and decisions affecting their lives.

Through the Roundtable's training and support, community members also went on to start three organizations with their own focus: support for fathers, support for parents whose children had entered child welfare, and youth supporting other youth. This workbook draws on lessons from that work: bringing people together, building partnerships, and turning ideas into work that an organization can carry out and sustain. It adapts those lessons for anyone interested in starting a community-based organization, whatever community or issue brings you here.

Introduction

A place to explore your idea and plan the work

You may have an idea for helping your community, a need you've experienced yourself, or a concern that people aren't getting the help they need. This workbook gives you room to explore that idea and find out what it would take to make it work. You'll look at what already exists, what people in the community want, and what you could contribute. Along the way, you may decide to start an organization, work with an existing group, or reshape your idea based on what you learn.

You don't need a business background or all the answers to begin. Use these pages to write, ask questions, talk with others, and record what you find. Invite people with different experiences to think it through with you, especially those who live with the issue you hope to address. Take your time and return to earlier answers when something changes. The aim is to help you make informed choices and build a plan you are ready to carry out.

A Note to Yourself

Grounding your purpose

Before you begin, take a quiet moment to remember what brought you here. Why does this work matter to you personally? What do you hope to help change? Write yourself a note below. It doesn't need to sound polished, and you don't have to share it. On the days when the work feels hard or confusing, come back to it and remember your why.

Write your note to yourself here (Why does this work matter to you personally?):

1. Why This Organization, and Why Now?

Start with what you see

You see something that needs to change. Before deciding what to build, take time to learn more about the need, the people affected, and the work already happening. A few conversations and basic research can help you test your idea and find where your effort could make a useful difference.

What is happening in your community that makes you want to act? Who is affected?

What have you experienced or heard directly? What are you assuming or still unsure about?

Why does this need attention now? (Consider what has changed, or how long the need has gone unmet)

1. Hear From People Living with the Issue

Co-designing with the community

Your experience matters. Other people may have different experiences with the same issue. Before deciding what people need, ask them. Start with a few conversations. Ask: What help do you need or wish was available? What has worked well for you? What gets in the way of getting help? What would you most like to see change?

What did you hear? What surprised you or challenged your thinking?

Whose experience is still missing from what you've learned?

1. Find Out What Already Exists

Researching existing services to prevent duplication

Spend 30-60 minutes searching for both organizations and the help someone would actually look for. Look at local government pages, libraries, community directories, neighborhood groups, and faith communities. Record what you find below:

Organization or Group	Who it helps & what it offers	Questions to follow up on	Could we work together?

1. Look at the Gap & Consider Partnership

Finding your unique place

An organization may offer a service that people still struggle to use due to hours, transportation, cost, language, or eligibility. Consider whether working with an existing group meet the need, and what a new organization makes possible.

What appears to be missing or out of reach? What have you learned that supports this?

What is already working that we could support or build on?

Could working with an existing group meet the need? What would a new organization make possible that partnership alone would not?

1. Give the Idea a Manageable Beginning & Pause

Taking the idea seriously

What is one useful thing we could try first? What would we want to learn from it?

What can each of us realistically give without putting our health, household needs, or other responsibilities at risk?

Pause & Take Stock: Which next step makes the most sense right now? (Keep exploring, working with existing group, try a small activity, change focus, pause) Why?

2. Finding Out What You're Taking On Before Committing

Operational arrangements & independence

Starting an organization brings responsibilities like record keeping, handling money, and following regulations. Use this section to compare options—whether a board-led 501(c)(3), business, or project with an existing organization.

Do we want an organization led by a board, a business we own, or a project carried out with an existing organization? Why?

How do we expect to pay for the work—for example, donations, grants, payment for services, or a combination?

2. Accepting Support While Keeping Your Independence

Establishing healthy boundaries

Another organization may offer funding, space, or staff support. Before accepting, talk openly about expectations. Ensure you can keep your purpose, speak honestly, and understand who controls spending and what happens if you leave.

What decisions need to remain ours? What decisions would we share?

Who would control the money and approve spending? Could the supporting organization change our activities?

If the arrangement stopped working, how could we leave? What would happen to the project's funds, records, and name?

2. Find Out What Applies to Your Plan

Legal and regulatory research

Begin with official state and local government sources. Research what is needed to establish the organization, tax responsibilities, required permits, and ongoing reporting.

What do we need to find out?

Where will we check?

What did we learn, and when?

What still needs an answer?

2. Look Beyond the Cost of Getting Started

Preliminary operational expenses

Some expenses happen once (filing fees). Others continue even during quiet periods (insurance, space, bookkeeping).

Possible Expense	Cost to get started	Cost to keep going & frequency	Estimate or confirmed?

Which costs must we cover before offering our first activity? What if funding is delayed?

Pause Before Committing: Which path looks like the best fit so far, and why? Are we ready to keep planning?

3. What Are We Here to Do?

Defining scope, mission, and boundaries

Bring your research together. Define who you serve, what matters to them, and what you hope will change. Establish clear boundaries to protect against mission creep—the tendency to take on more than you can handle.

Who specifically do we intend to serve, and where?

Based on what we learned in Section 1, what matters most to these people?

What would be better for the community if our work succeeded? (This is your vision)

3. The Mission Sentence Starter

Drafting your core purpose statement

Use this helper to draft your mission. Customize the words to make them mean something to the community: "We work with [target audience] in [location] to [intended change] by [primary activity]."

Draft your mission and purpose statement here:

Decide Boundaries: What belongs within our purpose? What are we NOT prepared to take on?

3. Put Your Purpose on One Page

Your core compass document

Bring your final statements together here. Keep this page handy as a guide when difficult decisions arise.

Who we serve and where:

Our vision (The future we hope to help create):

Our mission (Why we exist and what we do):

The boundaries we need to remember (What we will not take on):

Who helped shape these statements, and who else should review them?

4. Who Needs to Be Part of This?

Building the plan together

People who help shape the organization develop a stake in making it work. Bring in people with lived experience, advocates, and community members early while there is still room to influence the plan.

Who should help?	What experience / perspective do they bring?	How could we invite them?

Whose voice is missing? What might make it difficult for them to participate? How can we support them?

4. Share the Work Clearly & Build Feedback Loops

Preventing burnout and staying aligned

Shared ownership grows through real participation. Define roles, backup support, and how concerns will be handled.

Role or Responsibility	Who could take it on?	Time & support needed	Backup / next person to train

How will people raise a concern, suggest a change, or disagree? How will we show we listened?

5. What Will We Do First, and How Will It Work?

Planning a manageable pilot program

Choose one activity or service to plan in enough detail that you can see what it will take. This pilot gives you a chance to learn and adapt before growing.

What will we offer first, and how does it fit our purpose?

Who is it for? How many people could we reasonably serve at the start?

What would we like this first effort to help people do or change?

What are we choosing to leave for later?

5. Walk Through It from Beginning to End

The participant experience

Imagine being someone seeking help. Think through how they find you, what they need to do, what happens during the activity, and what follows afterward.

Step in the experience	What needs to happen?	Who will do it, and what will they need?	What could make it difficult to take part? How could we make it easier?

5. Check What Needs to Be Ready

Readiness & risk check

Before setting a start date, make sure you have the skills, support, and approvals. Plan for what could go wrong.

What we need	Already available?	Who will arrange it?	Cost or question to carry forward

What could go wrong for participants or team members? What must be in place to respond?

6. 3-Month Startup Budget & Expenses

Grounding financial planning

Bring together the expenses from your Section 2 research and the needs of your first activity. Ensure you never rely on personal household funds without a strict written agreement.

What period does this budget cover? (3-month block recommended)

Expense Category	How we estimated it	Cost for this period

Which budget amounts still need checking? What if funding is delayed?

6. Find Support that Fits

Securing aligned resources

Track donations, grants, contracts, or shared partner resources. Treat all support as a possibility until confirmed.

Source of Support	Amount or Contribution	Confirmed or Exploring?	When available & conditions

Would any funding change our purpose, limit our independence, or require unplanned work?

7. How Will We Earn and Keep Trust?

Decision making and transparency

Clear responsibilities protect the people you serve and those doing the work. Establish clear boundaries for spending approvals, conflicts of interest, and handling personal information.

Decision to make	Who can decide?	Who needs a say / review?	How will we record & explain it?

How will we handle decisions where someone involved could benefit personally (conflict of interest)?

Who can approve spending/payments? Who else will review financial records to ensure checking?

7. Protect and Resolve

Managing information and concerns

What personal information must we collect? Where will it be kept, and who can see it?

How can community members, staff, and volunteers raise concerns? Who responds, and by when?

Who can they contact if the concern is about the person in charge?

What will we share regularly about our decisions, spending, and work to hold trust?

8. How Will People Find Us and Get Involved?

Reaching your target audience

Think about where your audience already gets information and whom they trust. Use the table to map outreach.

Who we want to reach	Where or through whom can we reach them?	What are we inviting them to do?	What language, format, or other accessibility support will help people understand and respond?

8. The SOCO Framework

Single Overriding Communications Objective

A SOCO helps you choose the one main point you want an audience to remember and what they should do next. The way you explain your purpose can change depending on the audience, but your core purpose must stay recognizable.

SOCO: COMMUNITY MEMBERS (Who specifically? One key point? What should they do next?):

SOCO: FUNDERS (Why does this matter to them? Supporting facts? Next step?):

8. Partner & Candidate SOCOs

Aligning professional relationships

SOCO: POTENTIAL PARTNERS (Common goals? One thing to remember? How to collaborate?):

SOCO: PEOPLE WHO MIGHT JOIN THE WORK (What is the expectation? Time commitment? Why join?):

9. How Will We Know We're Helping?

Feedback and continuous learning

Decide what you need to learn. Offer ways to respond that fit the people you serve. Use feedback to improve the work.

What will we ask people about what helped, what did not, and what they would change?

Use What You Learn: What are your parameters for adapting? Who will follow up and when?

10. What Do We Do Next?

Synthesizing your planning

What are we moving forward with, and why? What are we deliberately leaving for later?

10. Make a Starting Plan

Your 30-90 day chronological action plan

Choose a manageable period. Name the person responsible for each step and confirm they can take it on.

Action or Step (What must happen first)	Person Responsible	Date or Deadline

Where to Find Information & Resources | Official back pages

- **Business Registration:** Visit your State's Secretary of State official website.
- **Local Requirements:** Check your specific City and County clerk pages for zoning, permits, or local licenses.
- **EIN Application:** Apply for an Employer Identification Number online directly at IRS.gov (free of charge).
- **501(c)(3) Status:** Search IRS Publication 557 and use official IRS instructions for Form 1023 or 1023-EZ.
- **Government Contracting:** Create a secure account on official SAM.gov. You will be assigned a Unique Entity ID (UEI) automatically. Note that the older DUNS numbers are no longer used.

Appendix: Sample Partnership Memorandum of Understanding

Supports Section 2 & Section 7

How to use this sample: Use this sample to understand what this agreement needs to address—not as a form to copy. It is based on real-world collaborative practices from the Family & Youth Roundtable.

The Situation: Community Pathways is a new, community-led project. Neighborhood Resource Center is an established, local nonprofit that has offered meeting space, administrative support, and temporary management of project funds while Community Pathways decides whether to form its own independent organization.

Purpose of the Agreement: This agreement describes what each group will do, which decisions Community Pathways will keep, shared responsibilities, money handling, and how to end the arrangement.

Agreed Responsibilities:

- **Community Pathways will:** lead decisions about its purpose, community activities, public messages, and relationships with participants and partners.
- **Neighborhood Resource Center will:** provide the agreed meeting space, process approved project expenses, maintain financial records for administered funds, and explain any rules that apply to those funds.
- **Both groups will:** name one contact person, meet regularly, share needed information, and raise concerns early.

Decisions and Independence:

- Community Pathways keeps full authority over its purpose and the work it chooses to pursue.
- The groups will identify in writing any decision that requires joint approval.
- Community Pathways may raise concerns or disagree with Neighborhood Resource Center without losing its right to participate in the agreement.
- Community Pathways may work with other partners and seek other funding unless a specific written funding condition says otherwise.

Appendix: Sample Partnership MOU (Continued)

Handling money and ending the arrangement

Handling Money:

- The groups will identify which funds Neighborhood Resource Center is responsible for receiving or managing.
- Before money is spent, they will agree on who can approve expenses and what documentation is required.
- Community Pathways will receive regular financial reports showing money received, money spent, and the balance remaining.
- Neither group will commit the other to an expense or obligation that has not been agreed to.

If Something Changes: Changes to responsibilities, decision-making, funding, or length of the agreement will be discussed and put in writing before they take effect.

Ending the Arrangement: Either group may ask to end the agreement. Before it ends, they will agree in writing on what happens to remaining funds, records, materials, participant information, equipment, and the Community Pathways name.

Draft MOU Questions: What decisions must remain ours? Who controls the money? Can we work with other partners?

Appendix: Sample Purpose Language & IRS Letters

Articles of Incorporation & IRS Determination Letters

Sample Purpose Language for Incorporation:

Articles of incorporation establish an organization under state law. A critical part is describing your purpose clearly. Compare your Section 3 workbook purpose with this plain-language sample:

> *"Community Pathways Collaborative brings residents and community partners together to improve access to practical supports for families facing housing instability. Its work includes community education, connection to resources, and activities shaped directly with people who have direct experience with the issue."*

Drafting Purpose Language: What matches your Section 3? What legal required terms need to be added?

Understanding an IRS Determination Letter:

If an organization's application for federal tax-exempt status is approved, the IRS sends an official Determination Letter. The letter is issued by the IRS, not written by the applicant. When reviewing, look for these critical items:

- **Organization Name & EIN:** Confirm the letter matches your records exactly.
- **Tax Code Section (e.g., 501(c)(3)):** Confirms the exact category of tax-exempt recognition.
- **Effective Date:** The date from which contributions are officially tax-deductible.
- **Classification:** Identifies public charity or other classification for funding requirements.
- **Reporting Responsibilities:** Details ongoing filing requirements (such as Form 990).

Filing Deadlines & Records: Where will you keep your official original copy? Who handles ongoing filings?

Appendix: Sample Board Candidate Conversation & Application

Supports Section 4 & Section 7

Begin with the purpose, not the résumé: Before asking someone to join your board, share your purpose, what the board is responsible for, and the time expected. Ensure a mutual fit.

Board Candidate Interview Application

Candidate Full Name & Preferred Contact Information:

Connection to Purpose: Why does this organization's purpose matter to you personally?

What skills, knowledge, relationships, or lived experience could you contribute to the board?

What time can you realistically commit? Are you comfortable raising questions, concerns, or disagreeing?

What would you need from the organization to participate fully and carry out the role well?

Acknowledgments & Credits

San Diego County Roundtable Roots

Materials informing this workbook include the Family & Youth Roundtable's five-step training and transcript, three-year strategic plan, outreach plan, SOCO worksheet, and 2007 HHSA Memorandum of Understanding, along with Donna Ewing Marto's "Proven in Practice" account and experience.

• **Source Training Credits:** Laurie Chapman, LCSW, and Donna Ewing Marto.
• **Strategic Planning Facilitator:** Todd Sosna, Ph.D.
• **Cover Quotation:** Attributed to Margaret Mead.

Set your plans, stay grounded in your community's lived experiences, and move forward intentionally.

End of Workbook. Generated by Gemini Notebook as a digital fillable planner.

Taking Your Next Step with Clarity

A LUV Solutions Strategic Clarity Conversation

You have done the hard, quiet work of mapping your community's needs, organizing your team, and drafting a budget that protects your household. That is a brave and beautiful beginning.

But you do not have to take your next steps alone.

If you would like a warm, experienced pair of eyes to look over your workbook pages with you, I invite you to schedule a **Strategic Clarity Conversation**. You are welcome to invite a few of your team members to join us on the call so we can align our heads and hearts together.

This is a structured, quiet, **45-minute phone call** designed entirely to help you make decisions, clear away confusion, and establish defined next steps. We won't get bogged down in endless processing or corporate jargon—we will simply look at what you've written in these pages and build a solid, grounded path forward.

Length:	45 Minutes
Format:	Phone call (Invite up to 3 team members to join you on the line)
Investment:	$175 USD

How to Schedule:

When you are ready to bring clarity to your plan, simply click the link below to find a time that works for you and your team:

Click Here to Schedule Your Conversation