

New Program Onboarding

nopi.

Nonprofit Organization for Philanthropic Initiatives

support@thenopi.org | 617-702-2929

fax 617-843-9298



Company name,
Gusto Customer

We value the well-being and productivity of all meeting participants.



To create a more comfortable and focused environment, we encourage you to turn off your camera if you prefer. Your choice is respected and can help alleviate Zoom fatigue.



This presentation is being recorded for later viewing and listening. We understand that not everyone can attend this presentation in person. That's why we have made arrangements to record this event so that you can watch or listen to it at a later time.



This presentation is being transcribed for individuals with hearing impairment. Please speak clearly and at a moderate pace, mute your microphone when not speaking, and avoid speaking with your mouth full or covering it with your hand. There is no need to take notes as we will share this searchable transcript with you after the call.

Introductions

Drop a hello in the chat, sharing your name, title, organization, and location.

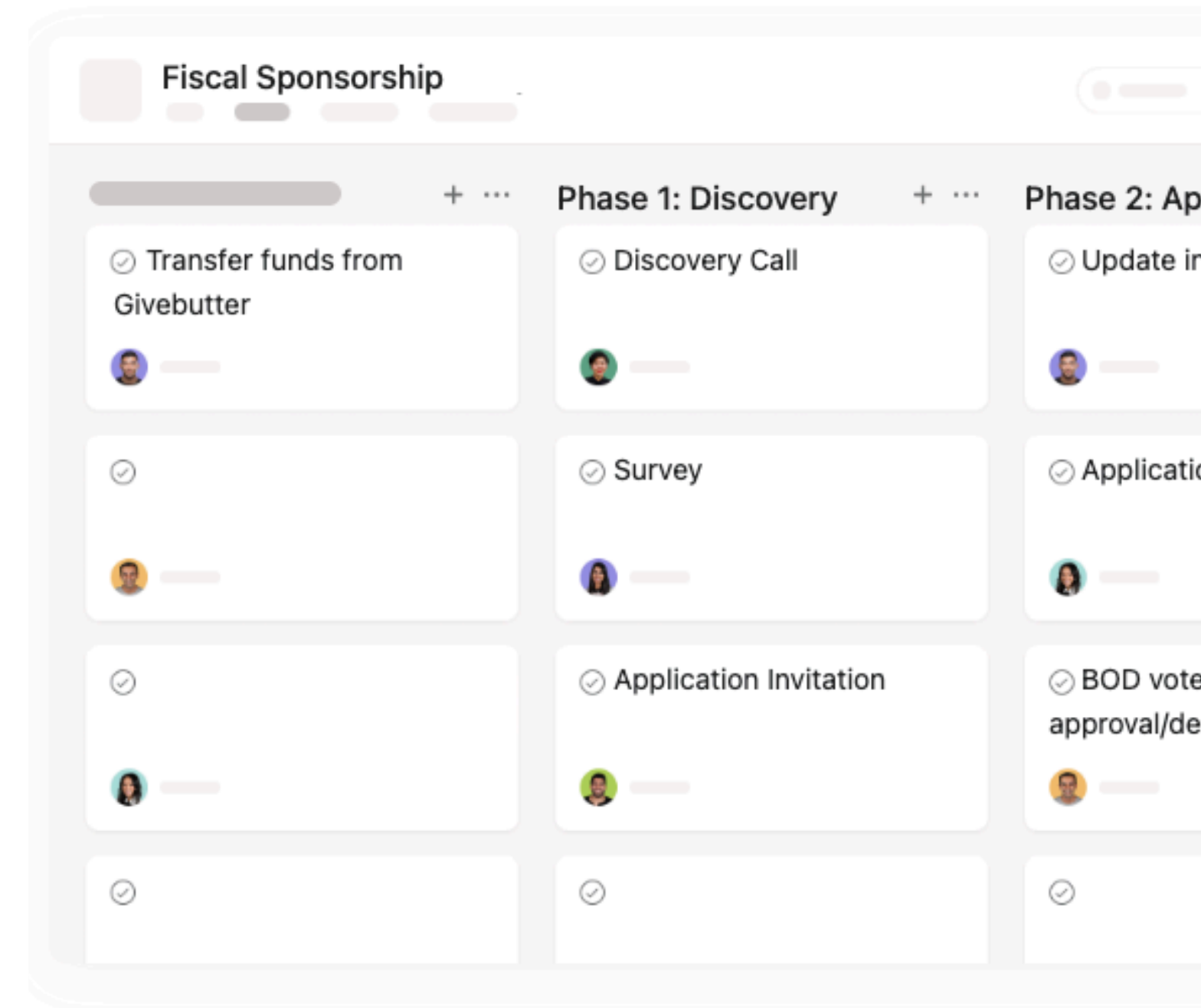
Share your mission, too!



Welcome!

We are honored to be supporting the incredible work of your organization 🎉

As your fiscal sponsor, we provide a 30-day onboarding process to welcome your program or organization into NOPI.



NOPI Support



[NOPI Knowledge Base →](#)

[thenopi.org/toolkit →](https://thenopi.org/toolkit)

[Office Hours →](#)

support@thenopi.org



Communication

Please email the correct address for your needs—like accounting@thenopi.org or support@thenopi.org

- Avoid cc'ing others in the organization to help minimize unnecessary auto-replies and speed up our response time

If your matter requires urgent attention

- Include "URGENT" in your subject line
- Briefly describe the emergency/urgent situation

NOPI embraces neurodiversity and will always respond to emails with kindness and understanding. We recognize that each of us communicates differently, and we value the patience and empathy we show one another. If anyone has questions or concerns about our communication practices, we encourage open dialogue to ensure we're all comfortable and supported.



Urgencies & Emergencies

True Emergency

Urgent, time-sensitive matters such as someone being injured at a program event or a critical incident like a fire (in which case, call 911 first). For true emergencies, please send a text to 617-702-2929, and a member of our team will respond as soon as possible.

Preventable Urgencies

Avoidable with advanced planning (for example, forgetting to make a large purchase and insufficient funds on your expense card) this would not qualify as an emergency. In such cases, we recommend making the purchase out of pocket and requesting reimbursement later.

NOPI embraces neurodiversity and will always respond to emails with kindness and understanding. We recognize that each of us communicates differently, and we value the patience and empathy we show one another. If anyone has questions or concerns about our communication practices, we encourage open dialogue to ensure we're all comfortable and supported.

Our Team



Amanda LaFleur
Executive Director
amanda@thenopi.org

The Center for Community Collaboration
Technical Assistance Providers
www.centerfor.community

Nikki Fisher-Quittmeyer, CLTC
Senior Advisor, Commercial Risk
nikki@bentonwoodconsulting.com

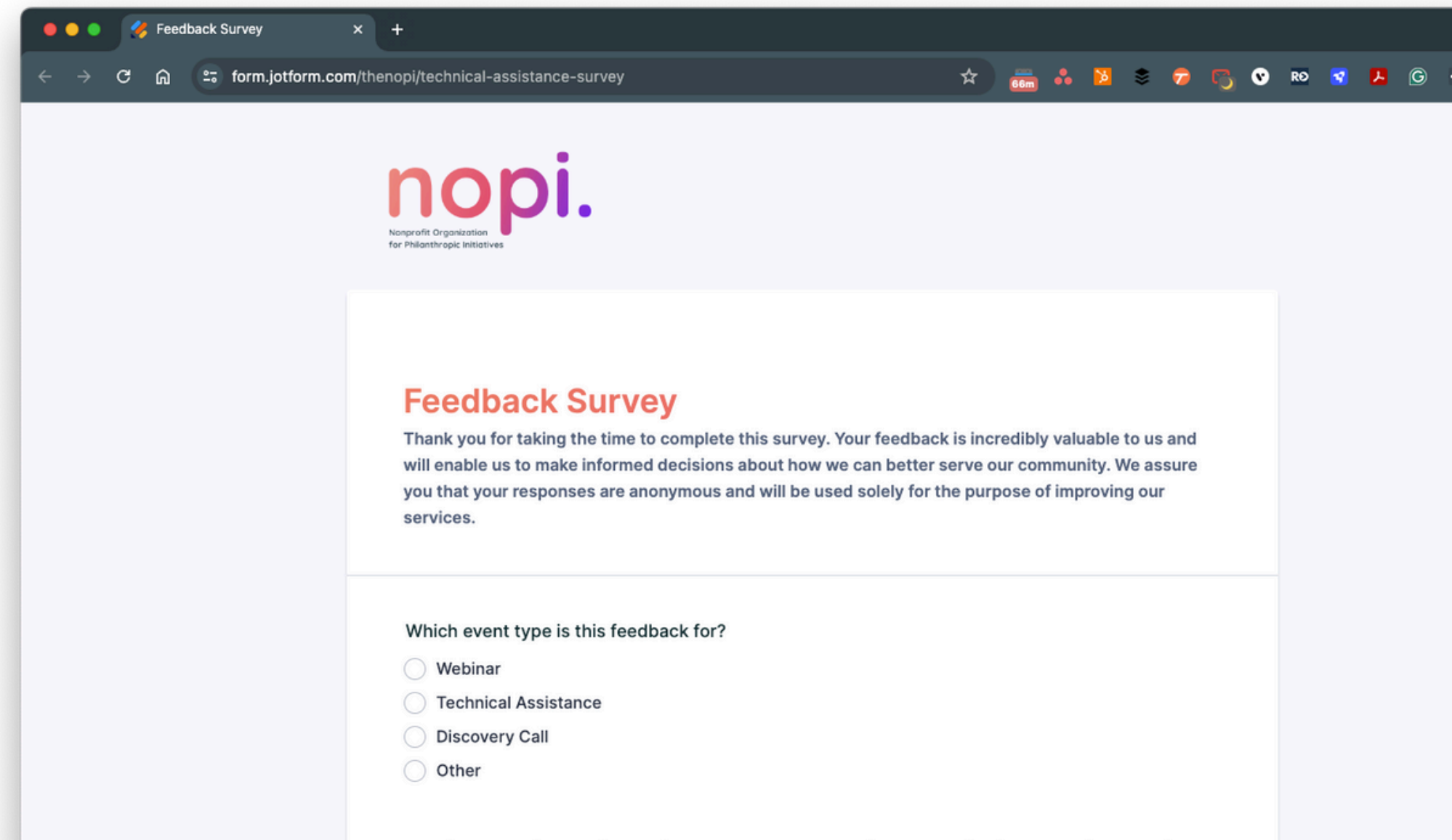
Valerie deGroot
Executive & Program Assistant
valerie@thenopi.org

Lindsey Stoecklein
Compliance & Nonprofit Notary
compliance@thenopi.org

Jericha Senyak
Bookkeeping & Financial Consultant
accounting@thenopi.org

Feedback Surveys & Impact Measurement

Your feedback is incredibly valuable to us and will enable us to make informed decisions about how we can better serve our community. We assure you that your responses are anonymous and will be used solely for the purpose of improving our services.



The screenshot shows a web browser window with the title "Feedback Survey". The address bar displays the URL "form.jotform.com/thenopi/technical-assistance-survey". The page features the "nopi." logo, which stands for "Nonprofit Organization for Philanthropic Initiatives". Below the logo, the title "Feedback Survey" is displayed in red. A thank-you message follows: "Thank you for taking the time to complete this survey. Your feedback is incredibly valuable to us and will enable us to make informed decisions about how we can better serve our community. We assure you that your responses are anonymous and will be used solely for the purpose of improving our services." The survey question is "Which event type is this feedback for?", with four radio button options: "Webinar", "Technical Assistance", "Discovery Call", and "Other".

Feedback Survey

Thank you for taking the time to complete this survey. Your feedback is incredibly valuable to us and will enable us to make informed decisions about how we can better serve our community. We assure you that your responses are anonymous and will be used solely for the purpose of improving our services.

Which event type is this feedback for?

☐ Webinar

☐ Technical Assistance

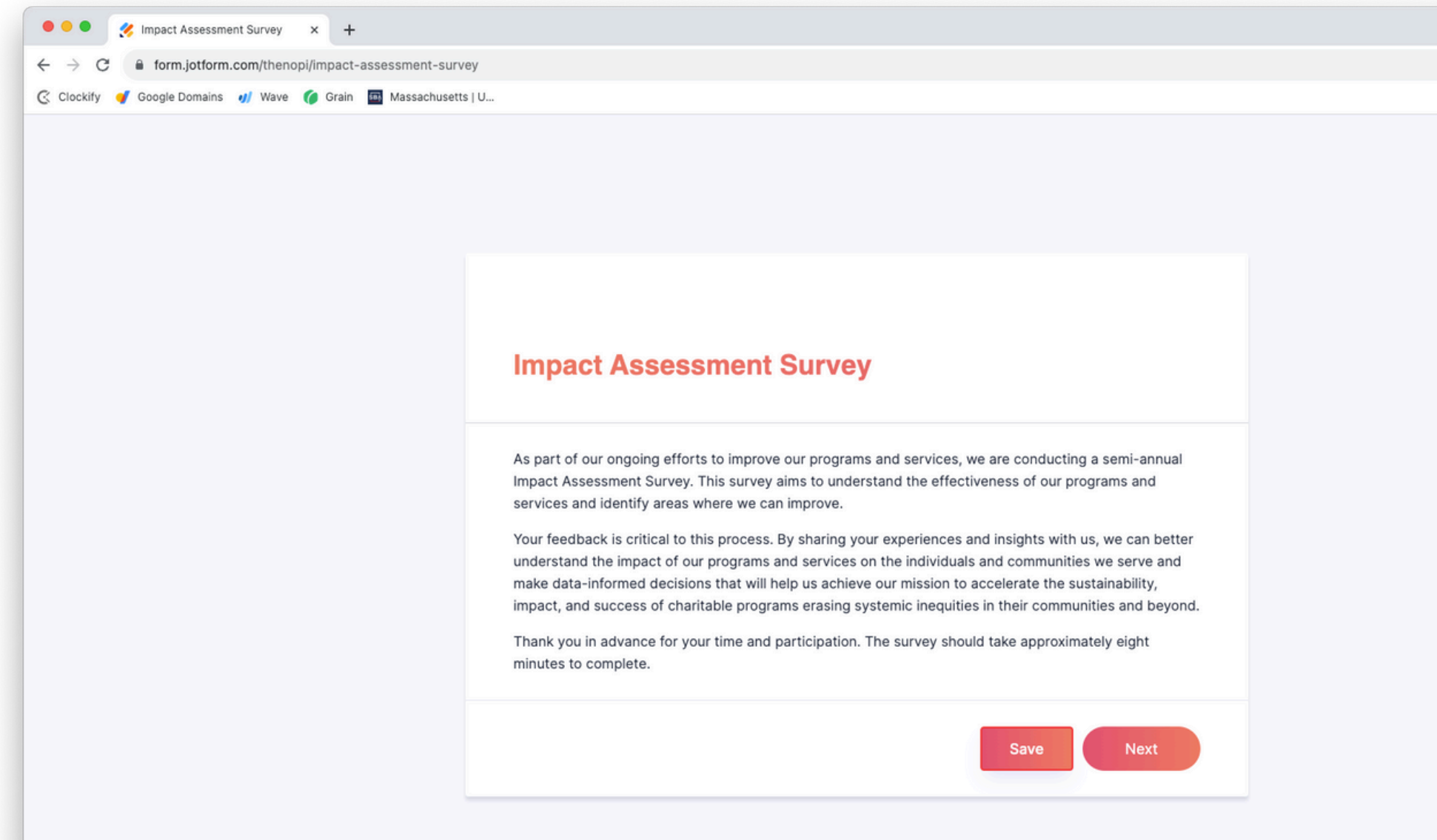
☐ Discovery Call

☐ Other

Feedback Surveys & Impact Measurement

By measuring impact, we increase our likelihood of receiving grant funding for NOPI and you!

Most funders require impact measurement in their selection process.



Impact Assessment Survey

As part of our ongoing efforts to improve our programs and services, we are conducting a semi-annual Impact Assessment Survey. This survey aims to understand the effectiveness of our programs and services and identify areas where we can improve.

Your feedback is critical to this process. By sharing your experiences and insights with us, we can better understand the impact of our programs and services on the individuals and communities we serve and make data-informed decisions that will help us achieve our mission to accelerate the sustainability, impact, and success of charitable programs erasing systemic inequities in their communities and beyond.

Thank you in advance for your time and participation. The survey should take approximately eight minutes to complete.

Save Next



What We Cover Today

- Models of Fiscal Sponsorship
- Project transfers*
- Compliance
- Fundraising tools
- Employment and benefits
- Payroll
- Expenses
- Accounting procedures
- Fund transfers*
- Volunteer recruitment platforms
- Grant readiness and tools
- Discounted and donated resources and more!

* not all will apply to your program or organization

Benefits of Fiscal Sponsorship

Fiscal sponsorship allows emerging nonprofits to operate under an established nonprofit organization's legal and financial umbrella. This provides them with a number of benefits, including:

- The ability to accept tax-deductible donations
- Access to grant funding and other resources
- Liability protection
- Business and management support



Responsibilities

Fiscally sponsored programs and organizations are responsible for:

- Complying with all applicable laws and regulations
- Managing their own finances and budget (reviewing financial statements)
- Maintaining accurate records
- Submitting receipts In a timely manner
- Submitting required reports to grantmakers
- Never compromising our 501c3 status



Resources

NOPI provides a number of resources to its fiscally sponsored programs and organizations, including:

- Access to free and discounted technology, software, and services
- Training and workshops on nonprofit management topics
- Mentorship from experienced nonprofit professionals
- Networking opportunities with other fiscally sponsored programs and donors



Models of Sponsorship

A, C, or F



Model A

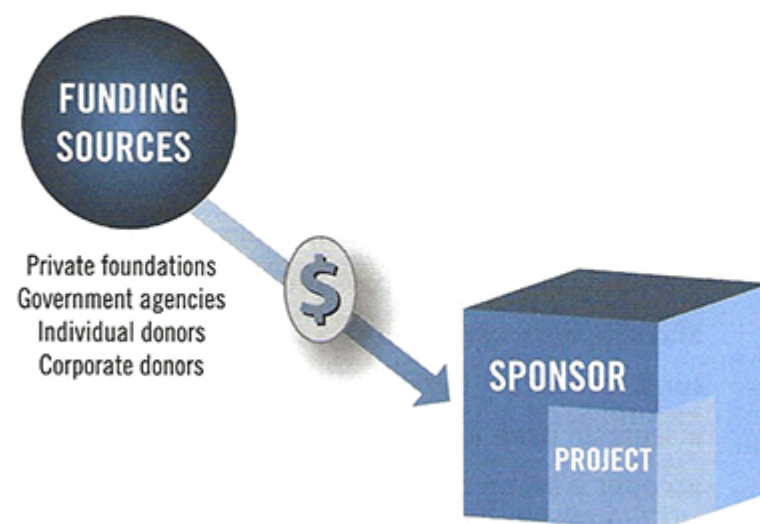
Direct or Comprehensive

The Program is a direct program of NOPI, not a separate organization.

Model A

Fiscally Sponsored Programs

MODEL A — DIRECT PROJECT —



Direct or Comprehensive

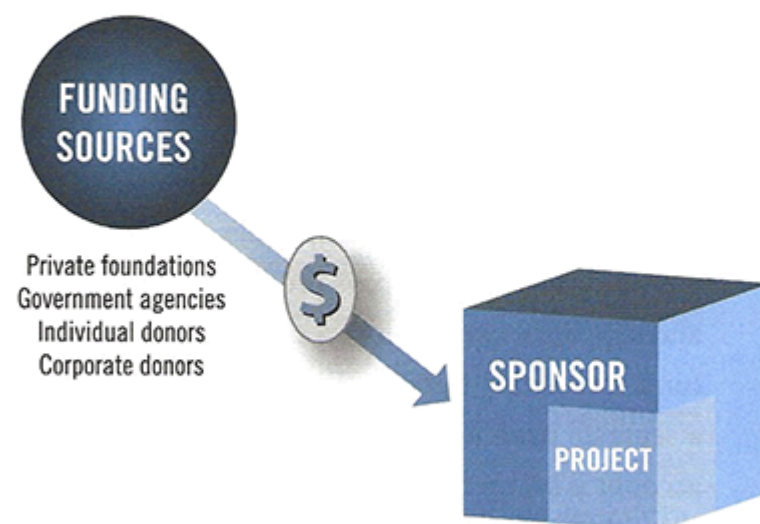
Legal Structure

- Unincorporated
- Direct Program of NOPI
- Operate under NOPI's EIN
- Operate under NOPI's 501c3 Designation
- Operate under NOPI's insurance
- No board of directors
may have an advisory board

Model A

Fiscally Sponsored Programs

MODEL A — DIRECT PROJECT —



Direct or Comprehensive Employees & Contractors

- Employees of NOPI
- Contractors of NOPI
- Under NOPI's workers comp
- Under NOPI's benefits plan

Knowledge Base | HR

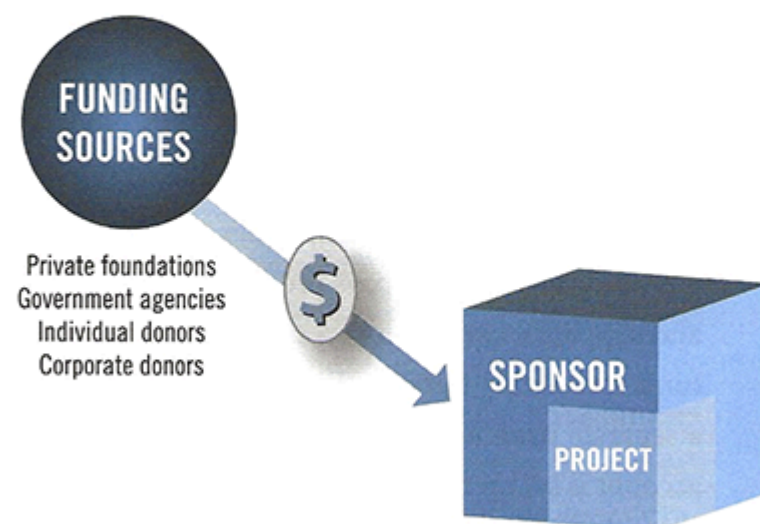
HR

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Model A

Fiscally Sponsored Programs

MODEL A — DIRECT PROJECT —



Direct or Comprehensive

Funding Distribution

- Contributions made to NOPI
- 90% of contributions are designated to the program
- 10% designated to admin (min \$100/mo)

Is there a "fee" for fiscal sponsorship?

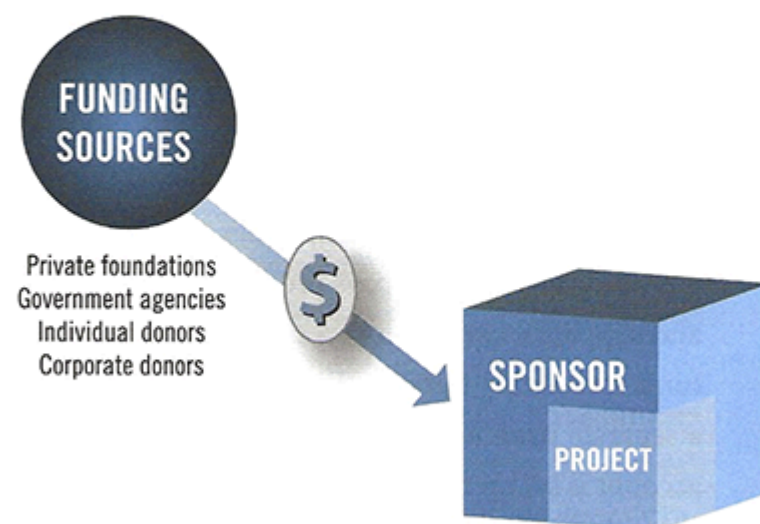
There is no fee for fiscal sponsorship. However, to support your mission, 10% of all contributions, such as donations, grants, sponsorships, and others, will cover administrative costs for your program.

💡 thenopi.org

Model A

Fiscally Sponsored Programs

MODEL A — DIRECT PROJECT —



Transferring Programs

- Copy of fiscal sponsor agreement
- Notice to former sponsor
- Project transfer agreement
- Funds transfer

Transferring from another fiscal sponsor

Here's what happens when a project moves from one fiscal sponsor to another

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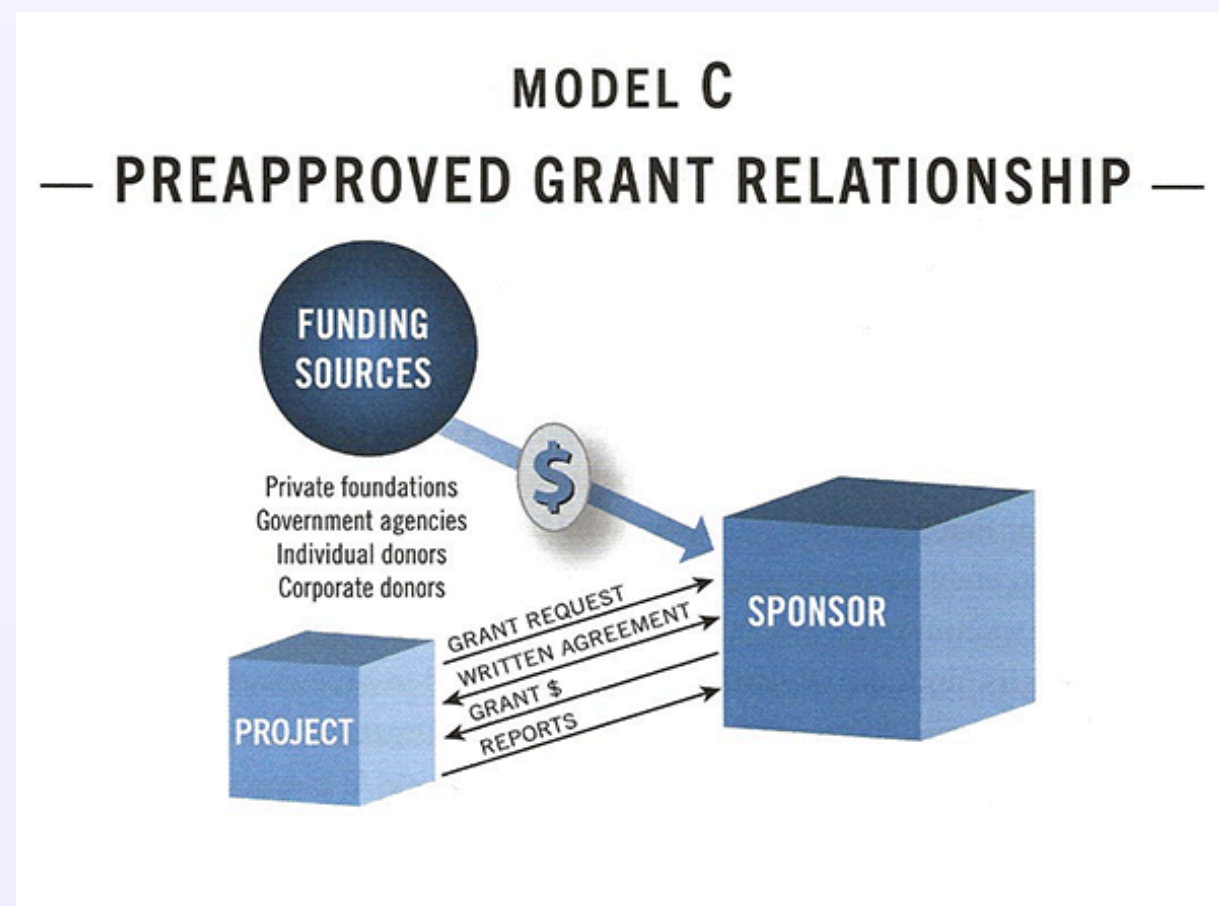
Model C

Pre Approved Grant

The Program is a direct program of an organization separate from NOPI.

Model C

Fiscally Sponsored Projects



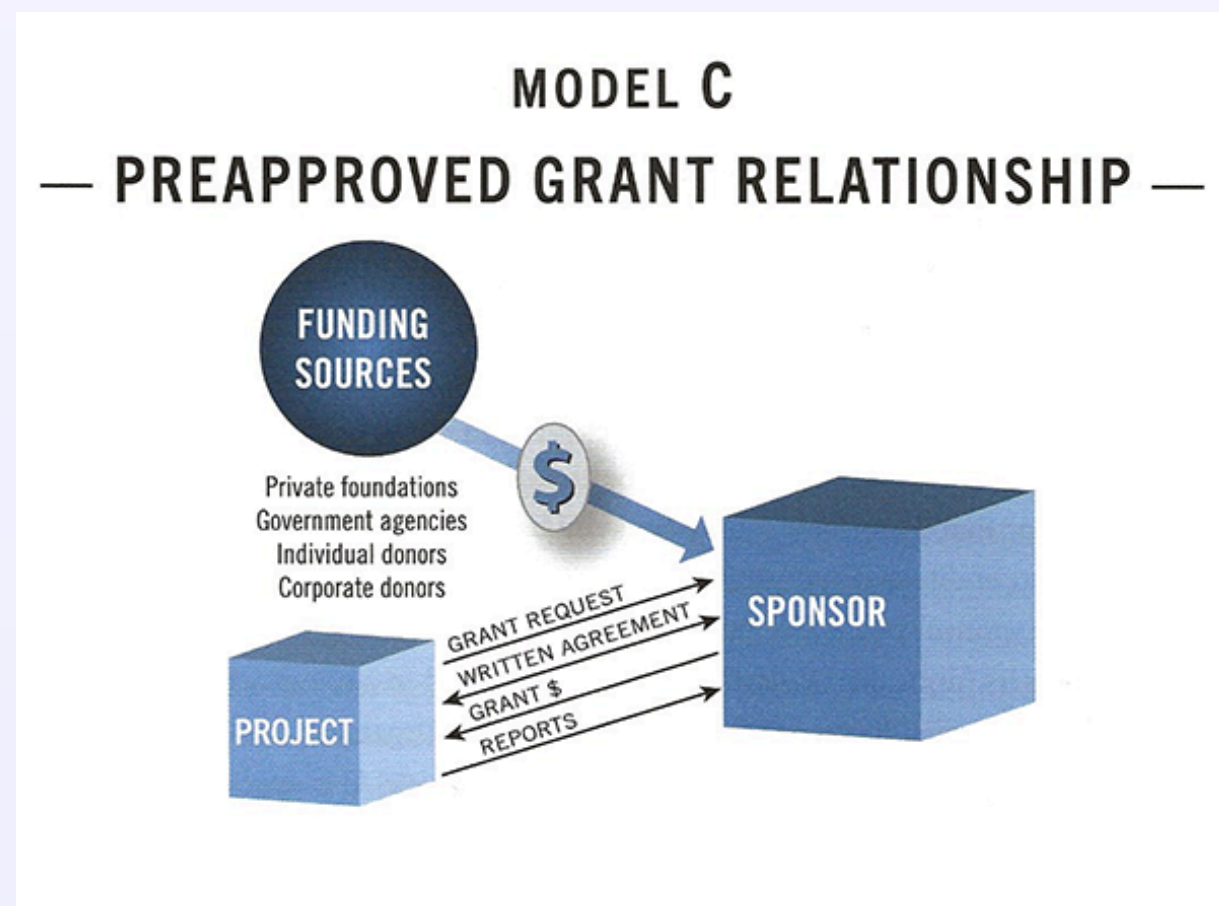
Pre-Approved Grant Relationship

Legal Structure

- Incorporated
- Direct program or project of a separate organization
- FSO has its own EIN
- FSO may or may not have a 501c3 Designation
- FSO has its own insurance
- FSO has a board of directors
may also have advisory boards

Model C

Fiscally Sponsored Projects



Pre-Approved Grant Relationship

Employees & Contractors

- Can be employees of NOPI or FSO
- Can be contractors of NOPI or FSO
- Can be under NOPI's workers comp or FSO
- Can be under NOPI's benefits plan or FSO

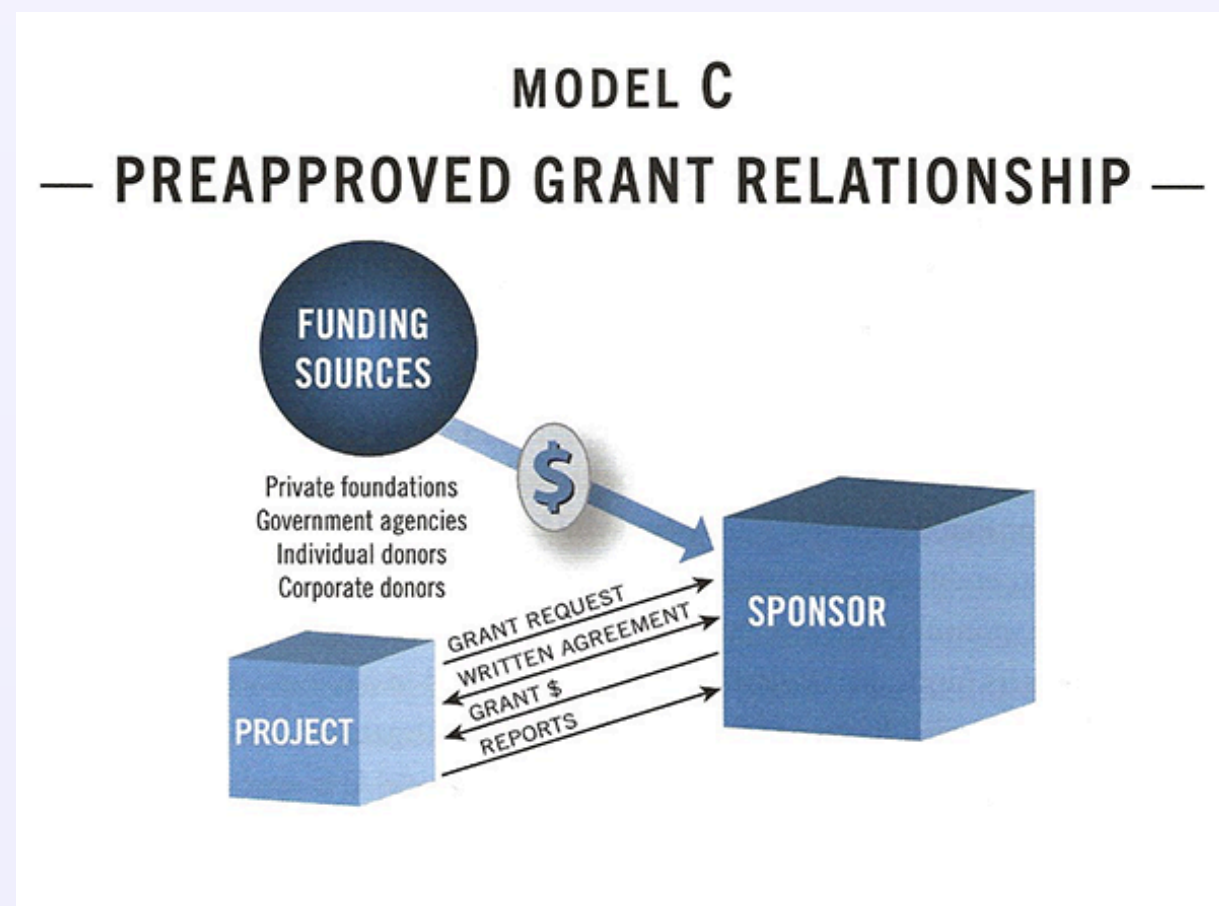
Knowledge Base | HR

HR

 thenopi.org

Model C

Fiscally Sponsored Projects



Pre-Approved Grant Relationship

Funding Distribution

- Contributions made to NOPI
- 90% of contributions are designated to the FSO
- 10% designated to admin (min \$100/mo)

Is there a "fee" for fiscal sponsorship?

There is no fee for fiscal sponsorship. However, to support your mission, 10% of all contributions, such as donations, grants, sponsorships, and others, will cover administrative costs for your program.

💡 thenopi.org

Model F

Technical Assistance

A separate organization receives technical assistance from NOPI.

Model F

Fiscally Sponsored Organizations



Technical Assistance

Legal Structure

- Incorporated
- FSO has own EIN
- FSO has own 501c3 Designation
- FSO has own insurance
- FSO has a board of directors
may also have advisory boards

Model F

Fiscally Sponsored Organizations



Technical Assistance

Employees & Contractors

- Can be employees of NOPI or FSO
- Can be contractors of NOPI or FSO
- Can be under NOPI or FSO workers comp
- Can be under NOPI or FSO benefits plan

Knowledge Base | HR

HR

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Model F

Fiscally Sponsored Organizations



Technical Assistance

Funding Distribution

- Contributions made to organization
- Sliding scale billed monthly
- **Additional costs or fees** may be billed monthly depending on services provided

Tools & Resources

community of sharing



Software & Technology

- Free and Discounted Platforms →

Google Workspace



Jotform



HubSpot



Most platforms/SAAS offer nonprofit pricing, and all offer sales tax exemption. Contact us to request documents needed for your platform/s of choice.

Software & Technology

- Free and Discounted Platforms →

techsoup



Google Workspace

Most platforms/SAAS offer nonprofit pricing and all offer sales tax exemption. Contact us to request documents needed for your platform/s of choice.

Model A	Model C	Model F
Join NOPI's account	Has 501c3: Create org account No 501c3: Join NOPI's account	Create org account
https://faq.thenopi.org/en/knowledge/join-techsoup	https://www.techsoup.org/joining-techsoup/registration	https://www.techsoup.org/joining-techsoup/registration
Some SAAS like Google Workspace and Zoom must be requested through us directly and not through TechSoup.		

TechSoup supports nonprofits, charities, and libraries by providing access to donations and discounts on software, hardware, and services from major brands.

Admin fees charged by TechSoup are deducted as a program expense or billed back to the organization.



Join TechSoup

FSOs may utilize our TechSoup membership for discounted and donated hardware, software, and Software as a service (or SaaS).

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Model A	Model C	Model F
Option 1: Join NOPI's account: Click here to request access	With 501c3: Apply for nonprofit discount through TechSoup	Apply for nonprofit discount through TechSoup
Option 2: Apply NOPI's discount to an existing Zoom account: Click here to request instructions	Without 501c3: See Model A option 1 and 2	Once account is approved by TechSoup, buy Zoom discount here →
Sales Tax Exemption: Add NOPI's Sales Tax Exemption to an existing account →	Sales Tax Exemption: Your org or ours depending on 501c3 status https://support.zoom.us/hc/en-us/articles/208186963-Tax-exemption	Sales Tax Exemption: Your org or ours depending on 501c3 status https://support.zoom.us/hc/en-us/articles/208186963-Tax-exemption

Zoom, [Microsoft Teams](#), and [Google Meet](#) are popular video conferencing platforms that offer free plans for nonprofits. Model A FSPs must request access to join our video conference tools, while some Model Cs and Model F FSOs will need to acquire their own accounts.

Subscription fees are deducted as a program expense or billed back to the organization.



Model A	Model C	Model F
Option 1: Join NOPI's account: Click here to request access	With 501c3: Apply through Canva for Nonprofits	Apply through Canva for Nonprofits
Sales Tax Exemption: Already included	Without 501c3: Join NOPI's account here to request access	Sales Tax Exemption: Your org's https://www.canva.com/help/tax-exempt-invoice/
	Sales Tax Exemption: You org or ours depending on 501c3 status https://www.canva.com/help/tax-exempt-invoice/	

Canva is an easy-to-use online graphic design tool. Use it to create social media posts, presentations, posters, videos, logos and more. Model A FSPs must request access to join our video conference tools, while some Model Cs and Model F FSOs will need to acquire their own accounts.

License fees and printing costs are deducted as a program expense or billed back to the organization.



Model A	Model C	Model F
Join NOPI's account: Click here to request access	With 501c3: Apply for the Google Nonprofit Grant	With 501c3: Apply for the Google Nonprofit Grant
	Without 501c3: Join NOPI's account: Click here to request access	

Help your nonprofit or charitable program collaborate more effectively with smart, secure business apps like Gmail, Docs, Calendar, Drive, and Google Meet. The Google Grant for Nonprofits has many benefits including a generous \$10,000 per month Google Ad spend.

Google Workspace



Accounting & Finance

money in & money out

Fiscal Sponsorship: Holistic Financial Oversight

- **Mazlo.** Dedicated bank account and debit cards for day-to-day expenses, self-serve reimbursement for out-of-pocket and mileage, expense management, and receipts
- **Givebutter.** Online fundraising tools, donor management, donor relations, and communication.



Receiving Funds (Pledges)

Givebutter Users

Instantly log pledged donations, matching gifts, and sponsorships as they are pledged.



- Go to <https://dashboard.givebutter.com>
- Go to Transactions
- Switch to the Pledges tab above the table
- Select + Add pledge and customize all the necessary details

Mazlo

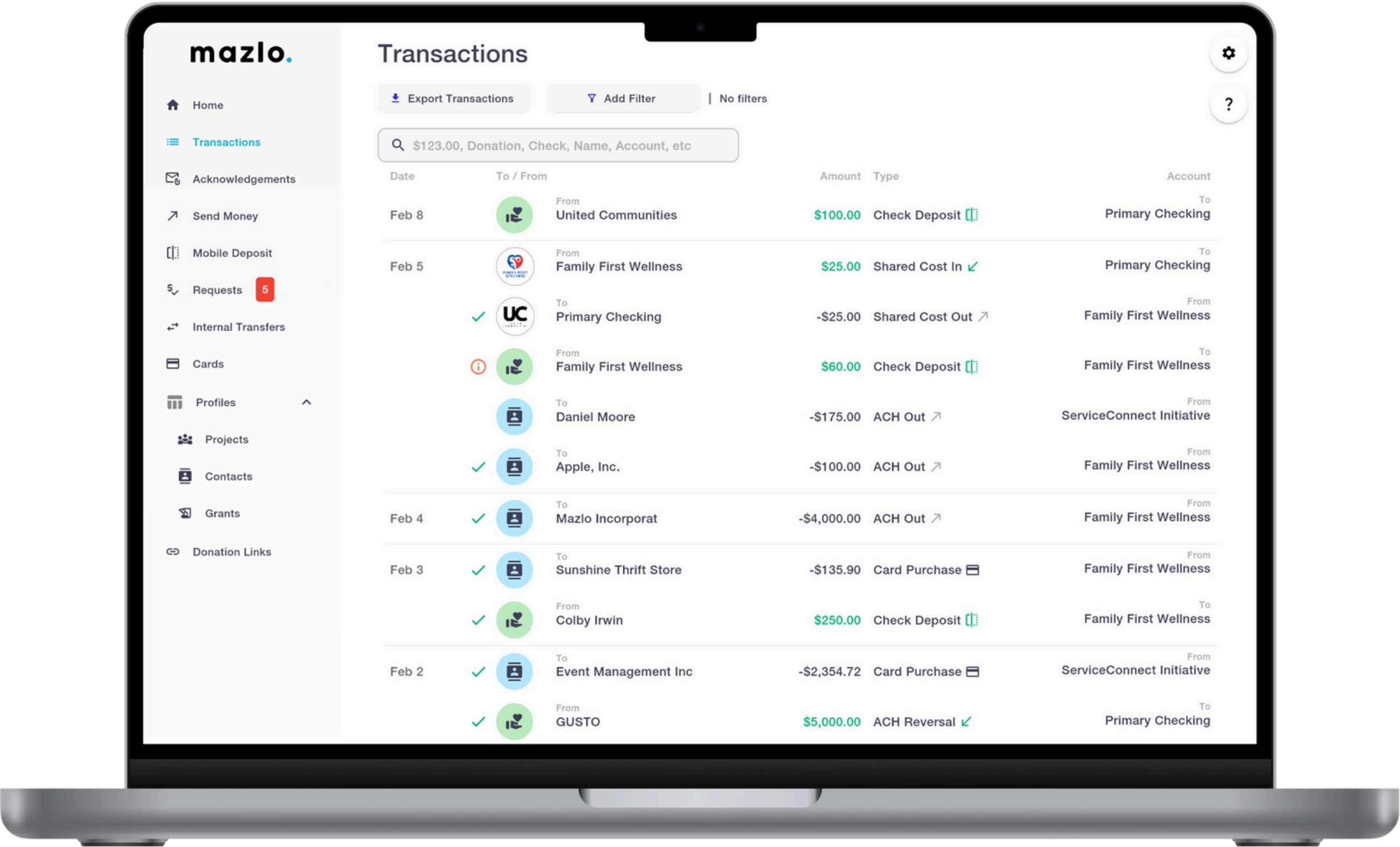
Follow the simple steps below to request donations, sponsorships, registration fees, etc.

- <https://learn.mazlo.com/donation-campaigns/create-a-new-donation-campaign>

mazlo.

Mazlo Log In →

Simplified accounting,
banking, compliance, and
fundraising so you can
focus on your mission,
not your back office.



Paying Bills/Invoices/Contractors

Add a Contact for a Recipient and Upload a W9 | Project Knowledge Base

Create a contact profile for a recipient, where you can request payment details, upload pertinent documents, and track payments made with your fiscal sponsor's approval.

mazlo.com

Create a Payment Request | Project Knowledge Base

Whether you need to pay for a good, service, or reimbursement, you can easily send a payment request to pay a recipient via ACH, paper check, or wire transfer.

mazlo.com

mazlo.

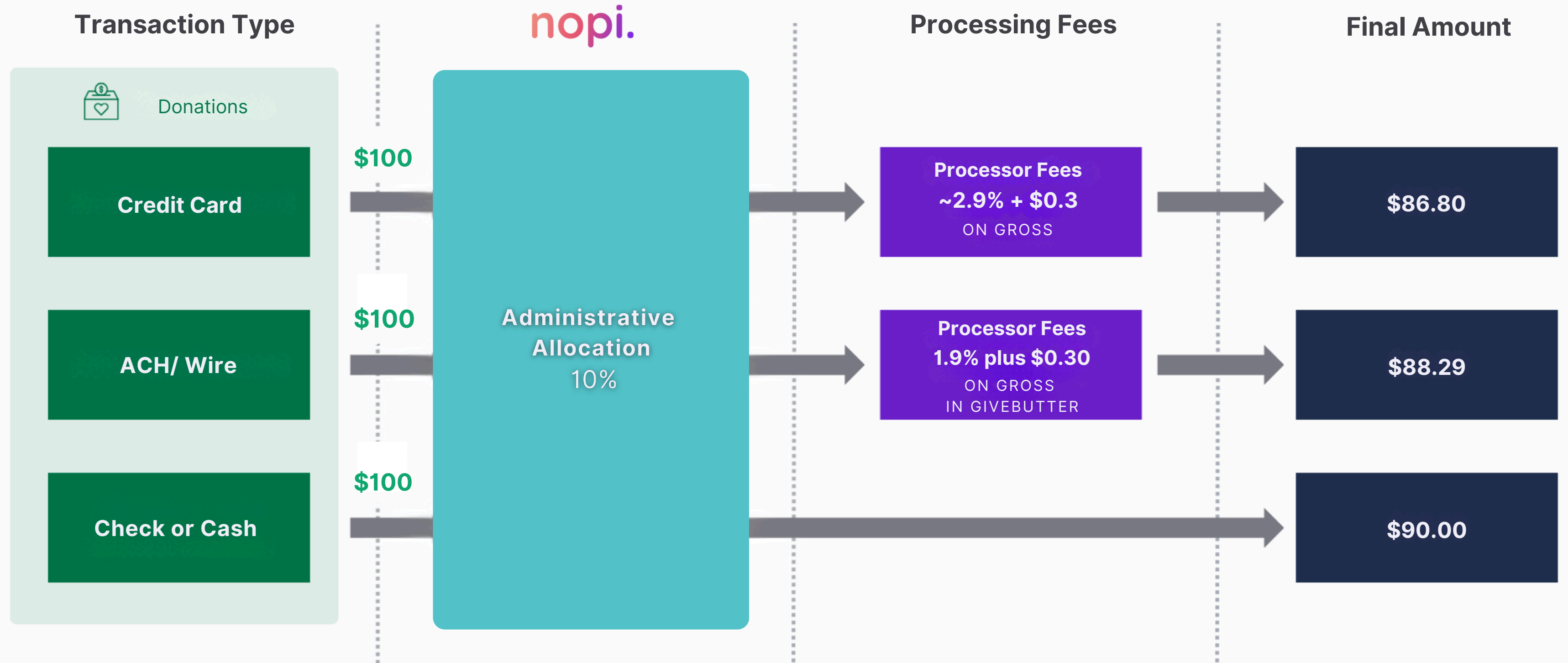
Mazlo Knowledge Base →

support@mazlo.com

Welcome to Mazlo! | Project Knowledge Base

Hello and welcome! We're thrilled to have you join Mazlo as a Project and are grateful for the amazing work you do to create a brighter future. In this guide, we'll help you navigate the key features of Mazlo to help you...

mazlo.com



Sales Tax Exemption

All FSPs and FSOs are eligible for sales tax exemption on all program-related purchases and subscriptions. Because **recouping sales tax after it's been paid can be time-consuming** (and sometimes impossible), an **approved vendor list** for your team can be very helpful. This ensures that each vendor has a copy of your organization's (FSOs) or our (FSPs) sales tax exemption on file.



Sales Tax Exemption

Fiscally sponsored programs are exempt from sales tax on program-related expenses.

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Payroll

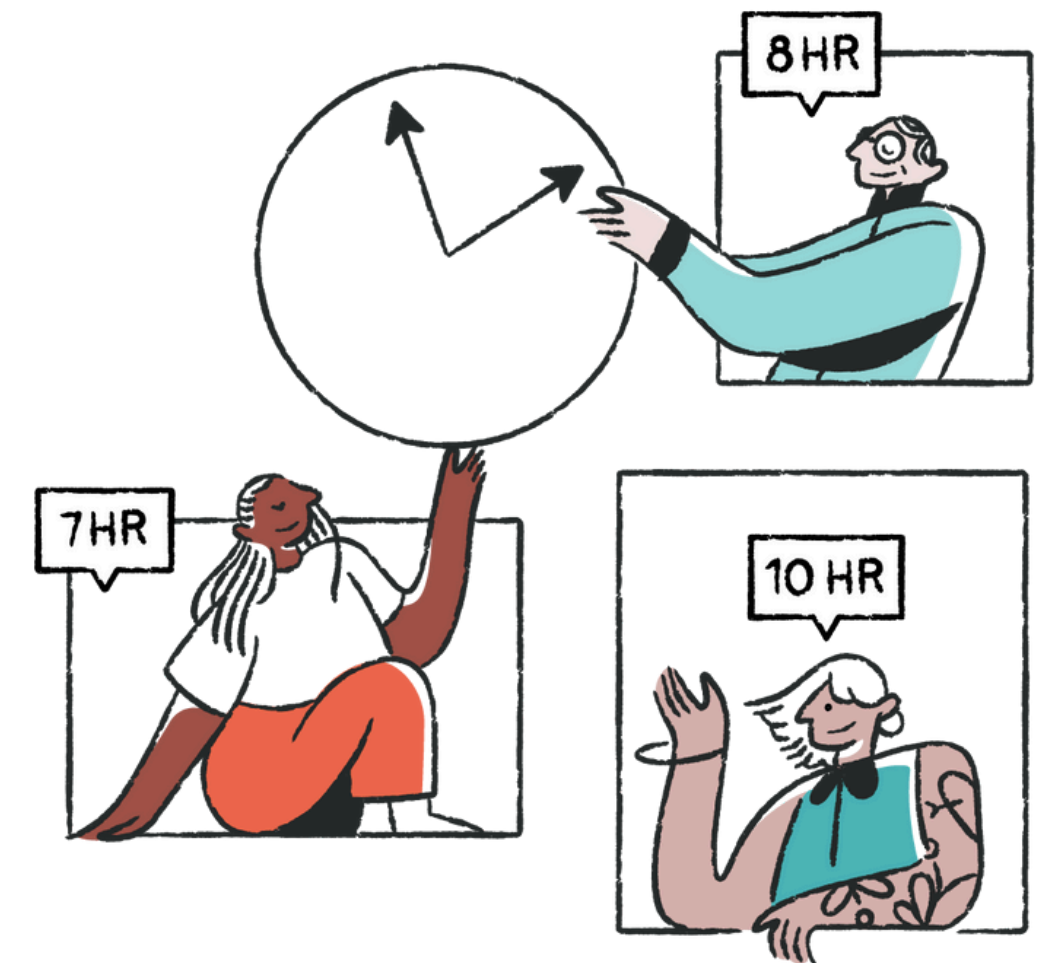
NOPI is the employer of record (EOR) for our Model A FSOs and some of our Model C & F FSOs. Program Directors must [register new Employees and Independent Contractors](#) before payroll can begin.

- Employees

[Paid via Gusto →](#)

- Independent Contractors

[Submit invoices in Mazlo →](#)



Knowledge Base | HR

HR

 thenopi.org

Fundraising

grants and donations



Grant Resources

instrumentl

Instrumentl is \$23.66 per month, per user (reg \$304 per month) paid annually. [Click here to request access](#)

Donations



Givebutter is a free online fundraising tool with the option for donors to cover the platform fees.

We will send you instructions for setting up your account.

Service/Event Fees

- Technical Assistance
- Event Sponsorship
- Consulting
- Event Vendors
- Participation Fees

Donated and discounted fees must have an equitable application and tracking process to ensure that they are distributed fairly and that their impact can be measured.

In-Kind Contributions



Create a free account at

catalog.good360.org/marketplace/sign-in

[Report in-kind donations here](#)

HR & Payroll

growing your team



Costs

Variables

- Workers compensation
- 3% contribution on 401(k)
- Benefit contributions
- Payroll taxes

Add-ons

- Health premium stipend
- Home office stipend
- Cell phone stipend

Hire an Employee

All employees hired by fiscally sponsored organizations are considered employees of NOPI.

 thenopi.org

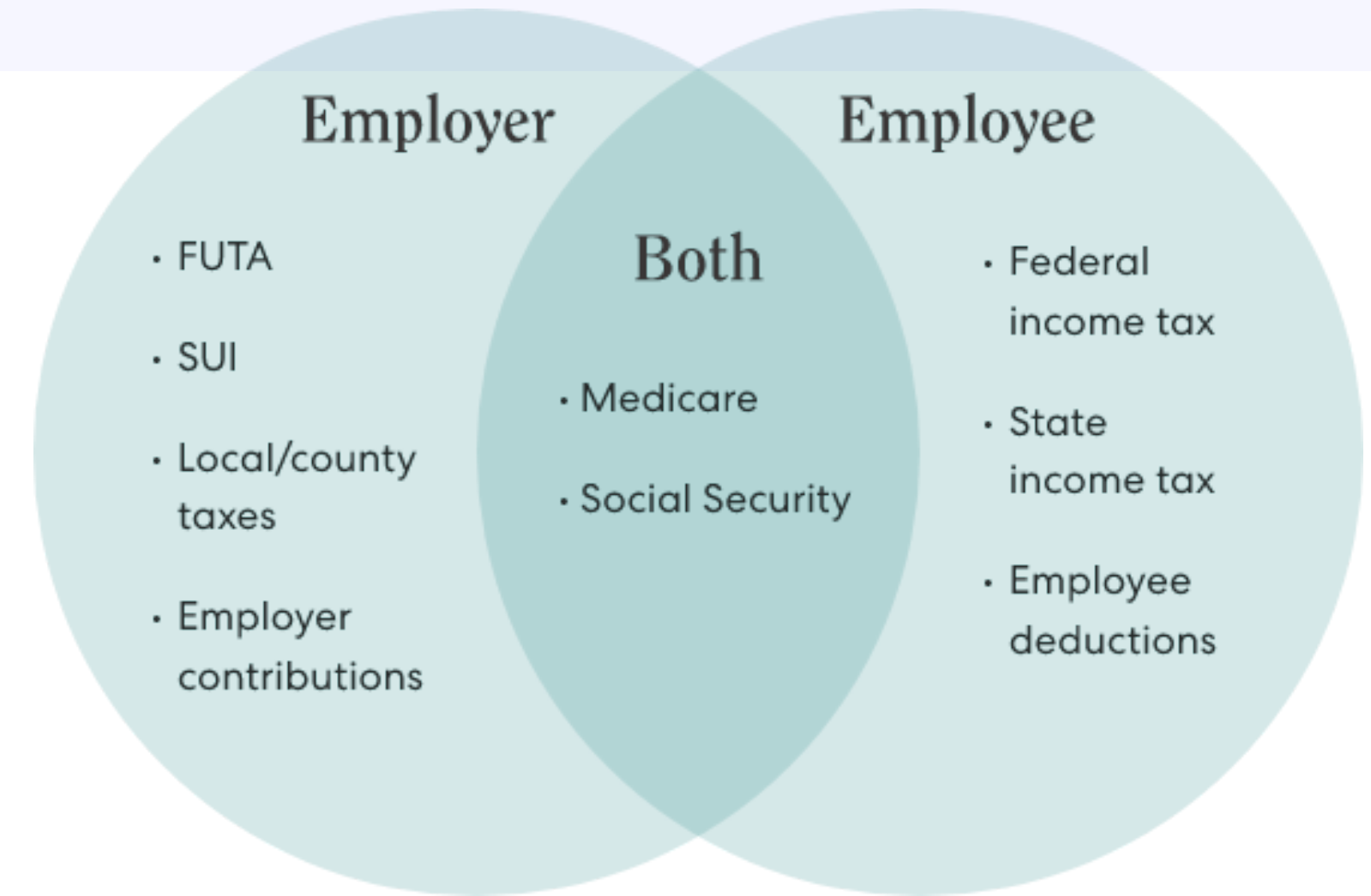
\$50 per team member

per month for Model A; 1% of employee compensation (min \$50/employee per month) for Model C & F.

- **Time tracking** system and reporting
- **Payroll processing** on the 1st and 15th
- **Direct deposit** or +\$1.50 per check
- **Compliance** HR, withholding, I9, W4, W2, paystubs, etc.
- **Access to benefits** including medical, dental, vision, discount plan, and 401(k)*
- **Flexible PTO** and paid holidays

Payroll Taxes

- Sponsorees are responsible for employer taxes for the locality and state where the employee lives and works
- NOPI handles all federal, state, and local compliance
- Sponsorees are exempt from FUTA



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Employer of Record | NOPI

Having NOPI as the employer of record for Model A and some Models C and F, fiscally sponsored organizations through our partnership with Gusto, offers several key benefits to smaller nonprofits and grassroots...

 nopi.



[New Hire Cost Calculator →](#)

Benefits

Employees are eligible for benefits 30 days after hire.

- Gusto Wallet app
- Medical
- 401(k)
- Dental
- Vision
- Basic Life
- Long-Term Disability
- Flexible PTO
- Paid Holidays



Cost of Benefits

Contributions are pre-tax. Programs may choose to reimburse employees after taxes for premiums, cell phone, travel, and more. Benefits begin after the 1st of the month, 30 days after hire. Dismissed employees receive benefits through the last day of the month, on or after termination



Benefit	Employee Pays	Program Pays
Medical*	0% of premium 100% for dependents 0% of premium for employee 100% of premium for dependents After Jan 1, 2024	100% of premium tier 1 plan ranges \$600-\$800 0% of premium for employee 100% of premium for dependents After Jan 1, 2024
Dental*	\$33.07 per month	\$33.06 per month
Vision*	\$9.36 per month	\$0
401K	Optional contribution	3% of compensation
Basic Life	\$0	\$8.50 per month
Long-term Disability	0%	100% of premium

*Benefit is subject to federal COBRA and state continuation after termination of employment ends.

Flexible PTO

We work hard but also believe that taking time off is personally and professionally essential. We do not limit the number of sick and vacation days employees may take during the year. Team members are expected to balance their work and time off appropriately.

PTO can be taken for various reasons, including planned vacations, personal days off, illness, bereavement, etc. Flexible PTO is a means to encourage the work-life balance and workplace flexibility we are known for.



Paid Holidays

- New Year's Day
- Martin Luther King, Jr. Day
- Presidents' Day
- Memorial Day
- Juneteenth
- Independence Day
- Labor Day
- Indigenous Peoples Day
- Veterans Day
- Thanksgiving
- Day After Thanksgiving
- Winter Break (12/25 - 12/31)

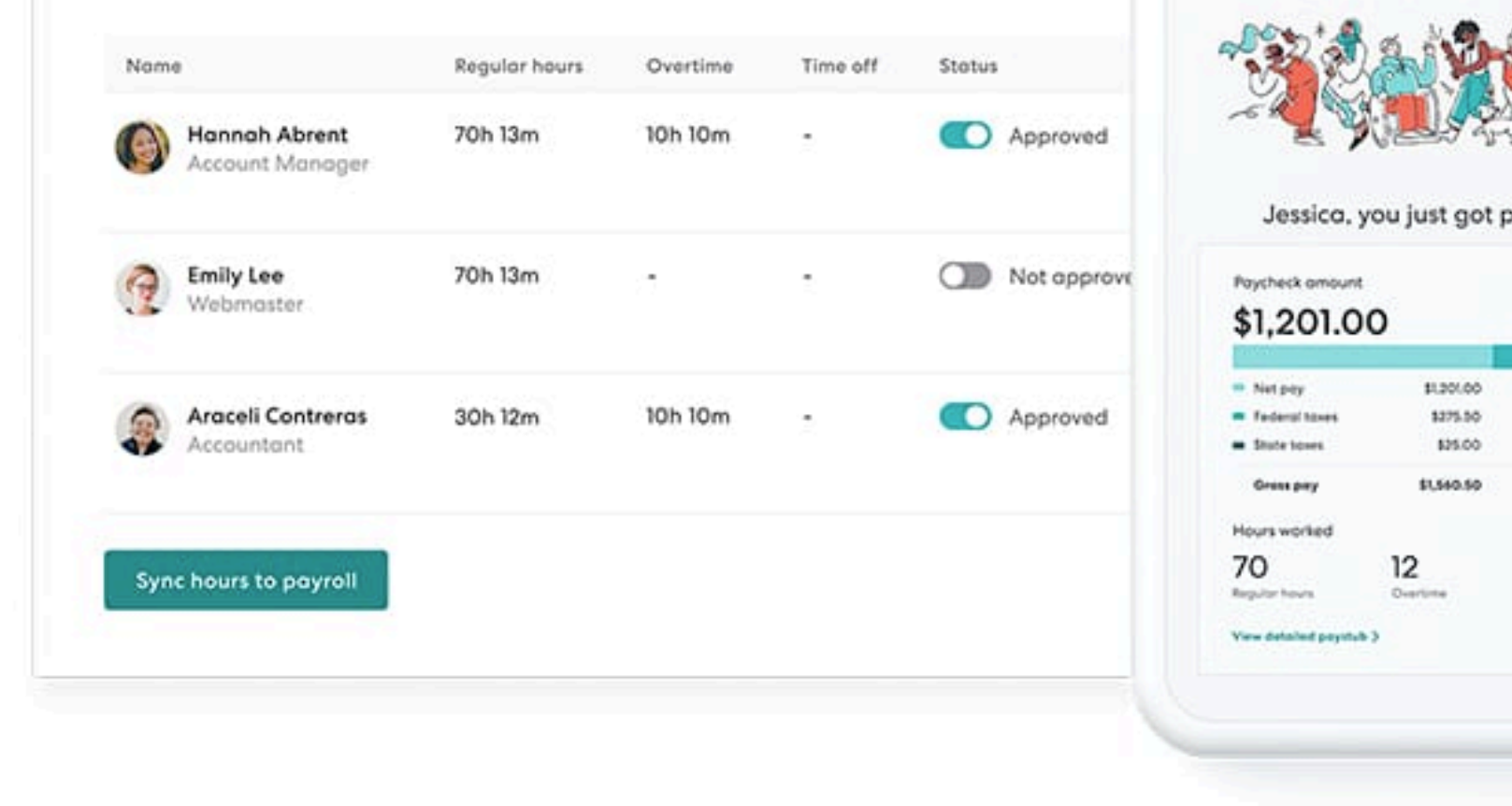


Time Tracking

1. Accept our email invite to Gusto
2. Download the Gusto Wallet mobile app or log in online →
3. Log time as an employee, or contractor →

*Volunteers track time in Clockify.

** Exempt employees do not track time.



Download the Gusto mobile app

If your employer uses Gusto, you get access to the free Gusto Wallet app. It's a smart new way to track, save, and access your hard earned money

Gusto / Jun 30



Common Questions

What paperwork do employees need to complete?

W4, I9, Confidentiality Agreement, eWorkplace Policy, and a Non-Solicitation Agreement

Do employees submit an invoice?

No. Non-exempt employees will track their time in our time-tracking system. Supervisors will approve time prior to each payroll.

How often is payroll?

Pay days are direct deposit on the 15th and last day of each month.

Common Questions

How are pay stubs and W2s distributed?

Gusto Wallet is a free platform that allows employees to complete their W4 and I9 online, access pay stubs and W2s, and set up an interest bearing checking account. [Download Gusto Wallet →](#)

Anything else we should know?

As we employ across the United States and labor laws vary state by state, we practice due diligence on a state by state basis for our on-site and remote workers. [Access Labor Law ePosters →](#)



Please send your questions to hr@thenopi.org

Insurance

protecting assets & managing risk



	Model A	Model C	Model F
Directors & Officers	✓	✗	✗
General Liability	✓	?	✗
Professional Liability	✓	?	✗
Special Event Coverage	Special Event Link		

Additional coverage is required at cost for activities that involve vehicles, children, medical care, water, or horses. Incorporated entities may need additional coverage. We will be sure to email you an insurance assessment form after this onboarding.



Please send your insurance questions to support@thenopi.org.



Nikki Fisher-Quittmeyer

Technical Assistance

signposting, consulting, &
volunteers



	Model A	Model C	Model F
Bookkeeping	✓	*	*
HR & Payroll	✓	*	*
State Filings	✓	*	*
Federal Filings (990)	✓	*	*
Fundraising Plan	*	*	*
Strategic Plan	*	*	*
Website Building/Support	✓	*	*
Google Grant	✓	*	*
Incorporation	✓	*	*
501c3 Application	✓	*	*

* limited pro bono or sliding scale support available

Pro Bono Support & Volunteers



- Model F and Model Cs with 501c3 designation may [apply for a standalone Catchafire account.](#)
- All others will be invited to our Catchafire. [Click here to request access.](#)
- [Click here to request access](#) to Catchafire, taproot, and Benevity

Find it in the Knowledge Base

Access the FAQ →

