

**Getting Started**

Item	Started	In Progress	Complete/Submitted	Resource	Notes
Directors & Officers Liability Insurance					Protects your organization in the event of loss as a result of a legal action brought for alleged wrongful acts in your capacity as directors and officers
File Articles of Incorporation with Secretary of State					<a href="#">National Association of State Charity Officials State Contact List</a>
Determine if your League will register for 501(c)(3) status					Leagues should file as a 501c4 with an optional 501c3 if needed.
(c )(4) only: submit IRS form 8976 "Notice of Intent to Operate under Section 501(c )(4)					Notification is due no later than 60 days after League establishment. Penalties may incur.
Obtain federal tax exemption					IRS Form 1023 or 1023-EZ (c3); 1024-A (c4)
Obtain Employer Identification Number (EIN)					IRS suggests nonprofits obtain an EIN even if there are no paid employees. EIN is similar to your personal SSN, only it's for your business. It identifies you to the IRS. Do not apply for an EIN until your organization is legally formed.
Obtain state tax exemption					Usually filed after IRS determination letter received
Charitable solicitation registration					Many states require registration from organizations that will solicit donations.
League email account					
League mailing address/PO Box					
Set up League bank account					
Establish nonpartisan policy					
Create bylaws					First three articles must match those of LWVUS
Adopt financial plan for sustainability and carrying out mission					
Develop plan for growing membership and retention with DEI lens					<a href="#">LWVUS DEI Lens</a>

**Annual Items**

**Local & State**

Item	Started	In Progress	Complete/Submitted	Resource	Notes
Audit financial records					
Review budget and update projections					
PMP submission					
Renew charitable solicitation if required by state					<a href="#">National Association of State Charity Officials State Contact List</a>
Complete corporate filing if required by state					<a href="#">Hurwit &amp; Associates Reporting Requirements by State</a>

**Federal**

Item	Started	In Progress	Complete/Submitted	Resource	Notes
990 or 990N postcard					Return is due on the 15th day of the 5th month after the end of the organization's fiscal year. (For example, the 2008 return of an organization whose fiscal year ends on June 30, 2009, would be November 15, 2009.)
(c )(4) only: Annual information return					

**LWVUS**

Item	Started	In Progress	Complete/Submitted	Resource	Notes
Roster management					
Annual Survey					

**LWV State League**

Item	Started	In Progress	Complete/Submitted	Resource	Notes
<b>State Leagues may edit this as needed</b>					

Biennial Items					
Item	Started	In Progress	Complete/Submitted		Notes
Program Planning					<a href="#">Occurs in even years with directive from LWVUS. Refer to LMS.</a>
Legislative priorities					<a href="#">Occurs in even years with directive from LWVUS. Refer to LMS.</a>
Biennial budget					

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Best Practices and Other Requirements					
Item	Started	In Progress	Complete/Submitted		Notes
Sign up for League Update					<a href="#">Sign up page</a>
Update bylaws to include 2020 approved DEI policy					<a href="#">Bylaws template</a>
