



A Checklist for New Homeschool Organizations Just Starting Out

By Carol L. Topp, CPA

1. Choose a name for your organization. Research the IRS Charities web site (www.irs.gov/eo), the internet in general, and your state's Secretary of State's Office to be sure it's not already taken.
2. Choose a group of at least three leaders to form a Board. Pick a President, Secretary and Treasurer.
3. Hold your first board meeting and discuss the 4 W's: What, Where, When, and Who and 2 C's: Cost and Curriculum. Take minutes of your decisions.
4. Together have the board write a purpose statement (or a mission statement and list of activities). Vote to approve it.
5. Obtain a Federal Employer Identification Number (EIN), by submitting IRS Form SS-4. (www.irs.gov/taxtopics/tc755.html). You'll need it to open a checking account.
6. Open a checking account as a non-profit organization.
7. Define your group by writing bylaws. See Sample Bylaws written specifically for homeschool groups at www.HomeschoolCPA.com
8. Create a budget for your first program year. Estimate income and expenses as well as a small surplus for uncertainties.
9. Run your program! Communicate your mission statement to everyone interested in joining you.
10. Read up on issues such as
 - Paying teachers or administrators as employees or Independent Contractors
 - Getting insurance for your homeschool group
 - Writing a policy manual and creating forms
 - Registering with your state if you do any type of fundraising

- Filing for 501c3 tax exempt status with the IRS

11. Continue to hold board meetings on a regular basis (monthly is recommended). You'll be amazed at the topics that come up!

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