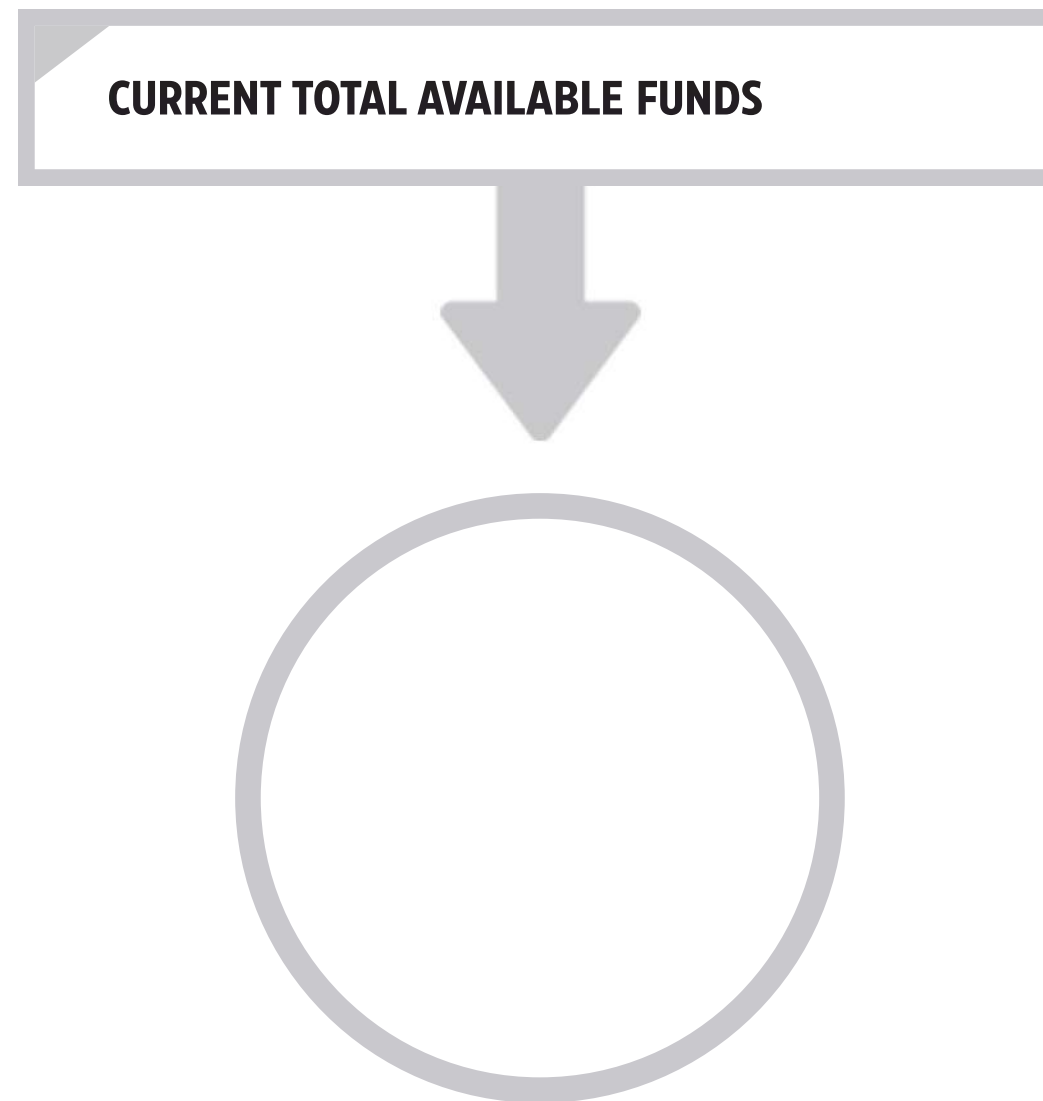


INTRODUCTION TO SCALING YOUR NONPROFIT DOWNLOADABLE WORKSHEET

If you're looking to expand your nonprofit and your reach, use this worksheet to figure out how much you can afford to expand and to help you budget all these new additions.

First, calculate how much money you've built up from donations and how much money you're receiving yearly:



Consistent Revenue Sources	Yearly Income Total
Source 1	
Source 2	
Source 3	
Source 4	
Source 5	
Source 6	
Source 7	
Source 8	
Source 9	
Source 10	

NEXT, DO YOUR BEST TO ESTIMATE HOW MUCH YOU'LL BE SPENDING ON EACH STAFF MEMBER PER YEAR:

Roles	Cost of Salaries
EXECUTIVE	
Program Managers	
Project Managers	
Operations Directors	
Administrative Assistants	
Development Directors	

Roles	Cost of Salaries
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FUNDRAISING	
Fundraising Managers	
Campaign Managers	
Membership Managers	
Grant Writers	
Donor Relations	
Major Gifts Managers	

Roles	Cost of Salaries
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FINANCE	
Financial Directors	
Accountants	
Finance Review Committee	

RESEARCH	
Researchers	
Data Analysts	
Policy Analysts	

Roles	Cost of Salaries
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LEGAL	
Legal Counsel	
Compliance Officers	

MARKETING	
Marketers	
Social Media Managers	

COMMUNITY	
Event Coordinators	
Volunteer Coordinators	
Community Outreach	
Case Managers	

Roles	Cost of Salaries
HUMAN RESOURCES	
Human Resources	
Recruiters	
IT	
IT	
Yearly Total	

NOW ESTIMATE HOW MUCH YOU BELIEVE YOU'LL BE SPENDING ON THESE NEW ASSETS:

COST OF NEW ASSETS

Assets	One-Time Cost	Yearly Cost
New buildings		
Rent/lease		
Utilities		
Maintenance		
Office supplies, furniture, equipment, etc		
Software		
Vehicles		
	ONE-TIME TOTAL	YEARLY TOTAL

LASTLY, FILL OUT THIS CHART WITH HOW MUCH YOU ESTIMATE YOU’LL BE SPENDING ON ANY OTHER EXPENSES DURING YOUR EXPANSION. USE THE LAST ROWS TO INSERT ANY OTHER COSTS YOUR NONPROFIT MAY ADD TO ITS OPERATIONS:

OTHER NEW COSTS

Items	One-Time Cost	Yearly Cost
Employee Benefits		
Payroll Taxes		
Recruiting		
Training		
Transportation/Gas		
Marketing		
Insurance		
Events		
Reserve Funds		

	ONE-TIME TOTAL	YEARLY TOTAL

Now add up all the different costs you've calculated and compare it to the revenue and available funds you added up in the beginning of this worksheet.

ONE-TIME COSTS GRAND TOTAL	YEARLY COSTS GRAND TOTAL

Is the amount of new staff and equipment you added affordable? Can you expand as much as you expected? Can you even expand more than you calculated?

Play with the numbers on the worksheet and keep this sheet handy as you watch my upcoming videos on how to scale your nonprofit. You may find yourself making more adjustments as you learn about scaling your organization in more detail.