

## NONPROFIT LEGAL SERVICES & CONSULTING

I offer a comprehensive menu of options specifically tailored to meet the unique needs of the philanthropic sector. Throughout my twenty-plus years in private practice, I have been actively engaged in serving local, regional, and state-wide nonprofit organizations on their boards as both a volunteer and more formally in a legal capacity. My legal background, passion for the sector, diverse experience in developing board structures and nonprofit management policy, and continuing education in the philanthropic sector and public policy provide a unique opportunity for nonprofit organizations to gauge their effectiveness with a thorough review and ongoing monitoring and analysis of their structure, policies, procedures, and field-specific issues.

Many nonprofit organizations understandably struggle with maintaining institutional knowledge, consistently following policy and procedure, and ensuring relevancy in an ever-changing philanthropic environment. I stay current in the best practices of the sector and can provide tailored services to meet your organization's needs. And if you're not yet a nonprofit organization but want to become one, I can provide everything you need to get you up and running.

My NONPROFIT LEGAL SERVICES & CONSULTING includes general legal services and policy and governance consulting with regard to:

- ⚖️ the sufficiency and effectiveness of your corporate documents
- ⚖️ your organization's board structure, meetings protocol, record-keeping, and reporting
- ⚖️ mission and vision, development (fundraising) practices and procedures, volunteer retention and outreach, financial systems and protocol, budgeting, and overall nonprofit management
- ⚖️ compliance with 501(c)(3) requirements and reporting
- ⚖️ working with auditors, CPAs, and tax preparers
- ⚖️ employment-related matters, contracts, liability
- ⚖️ pre-litigation evaluation, notices, and correspondence
- ⚖️ litigation collaboration and support in conjunction with trial counsel
- ⚖️ grant research, writing, and editing; grant compliance, tracking, and reporting
- ⚖️ legislative monitoring
- ⚖️ targeted policy research, analysis, and recommendations on field-specific projects, programs, and advocacy positions



## NONPROFIT LEGAL SERVICES & CONSULTING MENU

[filing fees & out-of-pocket expenses are *not* included in the costs quoted below]

### **Formation | \$2,000.00 (Form 1023-EZ) / \$3,000.00 (Form 1023)**

I will help you through everything you need to get your nonprofit organization up and running. Includes: formation resolution, conflict of interest policy, Articles of Incorporation, Bylaws, tax identification number, Application for Recognition of Exemption under 501(c)(3) of the Internal Revenue Code (Form 1023 *or* Form 1023-EZ), Nonprofit Application for Sales Tax Exemption, general recommendations for board structure, meetings protocol, and record-keeping and reporting requirements, attendance at the Organization's first regular Board Meeting for coaching and advice.

### **Initial Analysis & Recommendations | \$2,400.00**

All organizations seeking á la carte, ongoing, or targeted field-specific Nonprofit Legal Services & Consulting *must* undergo this initial analysis. I will: review your governing documents (Articles, Bylaws, Policies, Procedures); review your current annual budget and financial statements (to include the most recent audit and Form 990, if applicable); conduct interviews with key personnel and volunteers; and observe one board meeting and answer questions regarding the scope of possible Nonprofit Legal Services & Consulting at any level. Upon completion, I will provide your organization with a thorough analysis of your overall governance, policies, and practices and make recommendations as needed. This option is also available for any organization that simply seeks an independent review of and guidance on its structure, policies, and procedures and determine whether Nonprofit Legal Services & Consulting at any level would be helpful.

### **À La Carte | \$200.00 per hour**

If your organization only has an occasional need for Nonprofit Legal Services & Consulting, you can pay as you go. Contact me only as you need to for advice and guidance.



### **Annual Nonprofit Legal Services & Consulting**

Your organization may wish to have ongoing access to my Nonprofit Legal Services & Consulting and regular monitoring of governance, procedure, systems, and policies on an annual basis. Each organization will have needs varying in frequency ranging from an average of less than once per month to several times each month. You can pay an annual fee (or monthly, at your convenience) for varying levels of access:

⚖️ TESTING THE WATERS | \$3,000.00 per year or \$275.00 per month

Your organization anticipates seeking advice less than once per month. I will be available for you to contact as issues arise, and I'll review your organization's board meeting agenda and packet (meeting minutes, financial reports, committee reports, etc.) for the last meeting each quarter, to include your Annual Meeting, making recommendations as needed.

⚖️ SHALLOW DIVE | \$6,000.00 per year or \$475 per month

Your organization anticipates seeking advice no more than twice per month. I will be available for you to contact as issues arise, and I'll review your organization's board meeting agenda and packet (meeting minutes, financial reports, committee reports, etc.) each month, making recommendations as needed. In addition, I'll attend one board meeting (or other committee meeting if more appropriate) each quarter to observe procedures, make recommendations if needed, and/or engage in discussions that may need legal input.

⚖️ DEEP DIVE | \$10,200.00 per year or \$875.00 per month

Your organization anticipates seeking advice several times per month. I will be available for you to contact as issues arise, and I'll review your organization's board meeting agenda and packet (meeting minutes, financial reports, committee reports, etc.) each month. In addition, I'll attend most board meetings (or other committee meeting if more appropriate) to observe procedures, make recommendations as needed, and/or engage in discussions that may need legal input.

### **Targeted Research & Analysis / Grant Writing / Legislative Monitoring | Starts at \$3,000.00**

If your organization is considering implementing a new project, policy, program, advocacy position, to include writing a grant, for which outside research, analysis, and recommendations are needed, I will meet with you to assess your needs, do the research, and provide you with a written analysis. If you want, I will write grants and/or regularly monitor legislation relevant to your organization.

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*Does your organization have other tailored needs that don't quite fit in to the above options? Amy will be happy to consult with you at no charge to find ways to specifically tailor her unique Nonprofit Legal Services & Nonprofit Consulting to your needs.*