

Checklist for Starting a Non-Profit and/or Charity in Canada

This checklist is a starting point for you and your team as you dive into the “Business of Philanthropy.” This list is not all encompassing and you should seek legal advice as part of your process.

Before you Incorporate

- Conduct market research. With over 90,000 charities and an additional 130,000 non-profits in Canada, you may be better off supporting an organization that is already working on your issue or cause. Amplifying their work by leveraging your Time, Talent, Treasures, and Ties often leads to greater impact than if you were to start something new.
- Define your organization’s purpose. This includes articulating its mission and vision.
- Establish your Board of Directors (minimum 3 people inc. yourself) and possibly an Advisory team
- Write your business plan
- Create your operating budget
- Conduct a Nuans search (this is for your organization’s name)
- Secure the Domain Name by purchasing the URL(s)

Incorporation

- Register a corporate number under the appropriate act (Provincial - Societies or Companies; Federal – Canada Not-for-Profit Corporations Act)
- Register your organization’s name along with the number (you can use the number until you come up with a name that is suitable for the Registry. It is important to note that you will need your Nuans search done ahead of time and the name will have to have some specific attributes for the corporate registry.
- Draft the Objects and Purposes of the organization. You will need this if you decide to seek out charitable status.
- Draft Bylaws and/or Constitution (you have ONE year after registration to submit these documents)
- File Articles of Incorporation with either the provincial or federal Corporate Registrar
- If you are applying to become a charity complete the required forms. Estimate between 12 and 24 months for response from CRA and likely some back and forth clarifying communications.*
- Register for a GST number



Operations

- Create your Board Binder and have your first Board Meeting
- Open a bank account
- Secure appropriate insurance (Directors & Officers as well as General Liability)
- Set up your accounting and program record keeping
- Start on-boarding desired team

Fundraising

Depending on the type of corporate structure you have created will determine the type(s) of fundraising activities and tax-receipting eligibility you can provide. There are several ways organizations can generate income, fundraising is only one of them. If you decide that you are going to actively fundraise, consider the "revenue mix" so that you are not solely dependent on one type of funding (government, corporate, private, etc.).

It is important to remember that not all revenue can be applied to charitable activities. As such, seeking accounting and legal advice BEFORE you embark on soliciting funds from non-arm's length individual is highly recommended.