

# New Program Onboarding

nopi.

**Nonprofit Organization for Philanthropic Initiatives**

support@thenopi.org | 617-702-2929

fax 617-843-9298



Company name,  
Gusto Customer

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# We value the well-being and productivity of all meeting participants.



To create a more comfortable and focused environment, we encourage you to turn off your camera if you prefer. Your choice is respected and can help alleviate Zoom fatigue.



This presentation is being recorded for later viewing and listening. We understand that not everyone can attend this presentation in person. That's why we have made arrangements to record this event so that you can watch or listen to it at a later time.



This presentation is being transcribed for individuals with hearing impairment. Please speak clearly and at a moderate pace, mute your microphone when not speaking, and avoid speaking with your mouth full or covering it with your hand. There is no need to take notes as we will share this searchable transcript with you after the call.

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# Introductions

Drop a hello in the chat, sharing your name, title, organization, and location.

Share your mission, too!

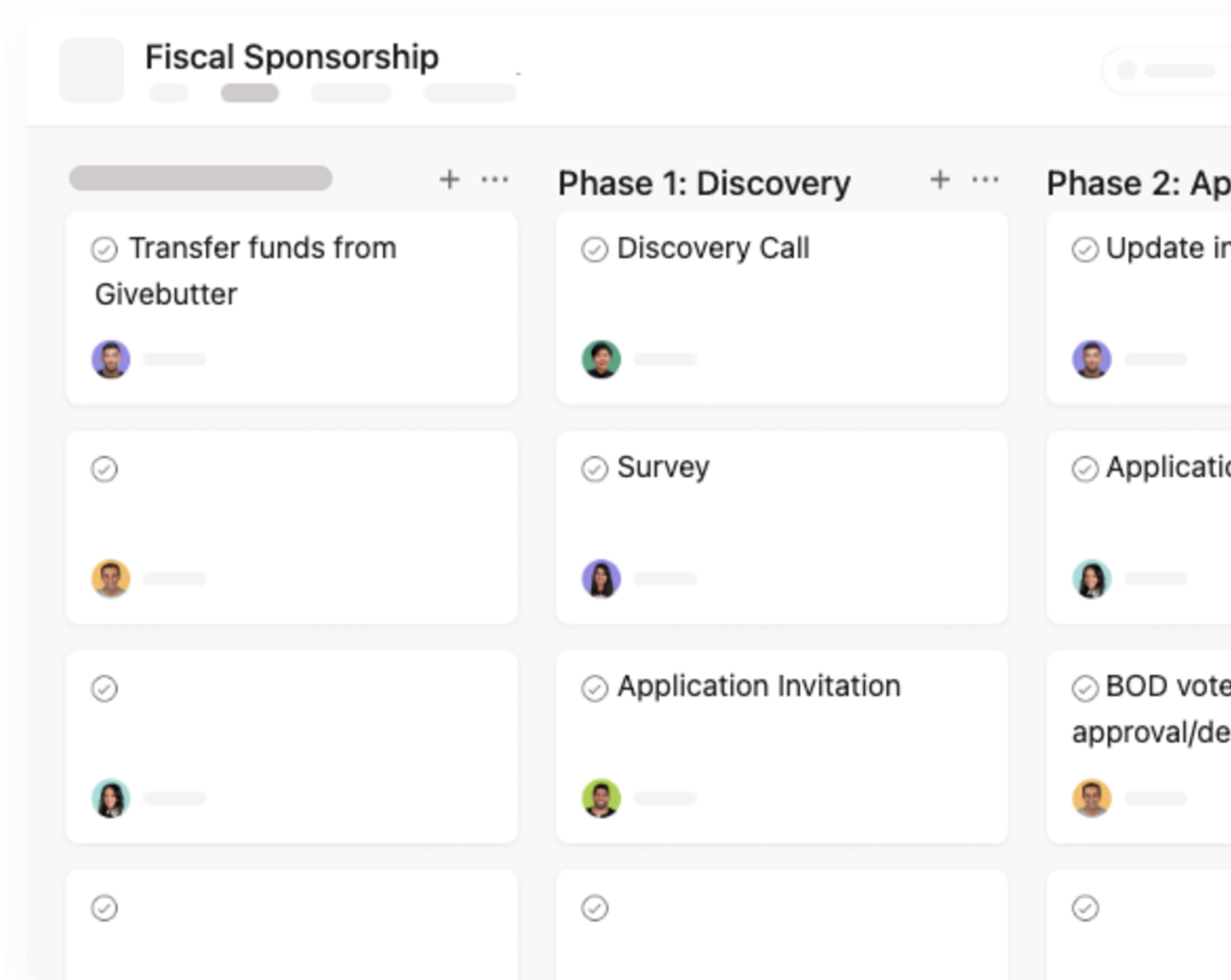


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# Welcome!

We are honored to be supporting the incredible work of your organization 🎉

As your fiscal sponsor, we provide a 30-day onboarding process to welcome your program or organization into NOPI.



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# NOPI Support



[NOPI Knowledge Base →](#)

[thenopi.org/toolkit →](https://thenopi.org/toolkit)

[Office Hours →](#)

[support@thenopi.org](mailto:support@thenopi.org)



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# Communication

- One-to-one emails (@thenopi.org)
- Weekly Updates
- SMS/Text: 617-702-2929

NOPI embraces neurodiversity and will always respond to emails with kindness and understanding. We recognize that each of us communicates differently, and we value the patience and empathy we show one another. If anyone has questions or concerns about our communication practices, we encourage open dialogue to ensure we're all comfortable and supported.

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# Our Team



**Amanda LaFleur**

**Executive Director**

[amanda@thenopi.org](mailto:amanda@thenopi.org) or [ed@thenopi.org](mailto:ed@thenopi.org)

**Melissa Wasilik**

**Program Officer**

[mel@thenopi.org](mailto:mel@thenopi.org) or [support@thenopi.org](mailto:support@thenopi.org)

**Lindsey Stoecklein**

**Compliance Officer**

[lindsey@thenopi.org](mailto:lindsey@thenopi.org) or [compliance@thenopi.org](mailto:compliance@thenopi.org)

**Roz, Amanda, Melanie, and Mike**

**Technical Assistance**

Pro bono and low bono TA is available for grant writing, strategic planning, fundraising, and more.

**Ginger Drake**

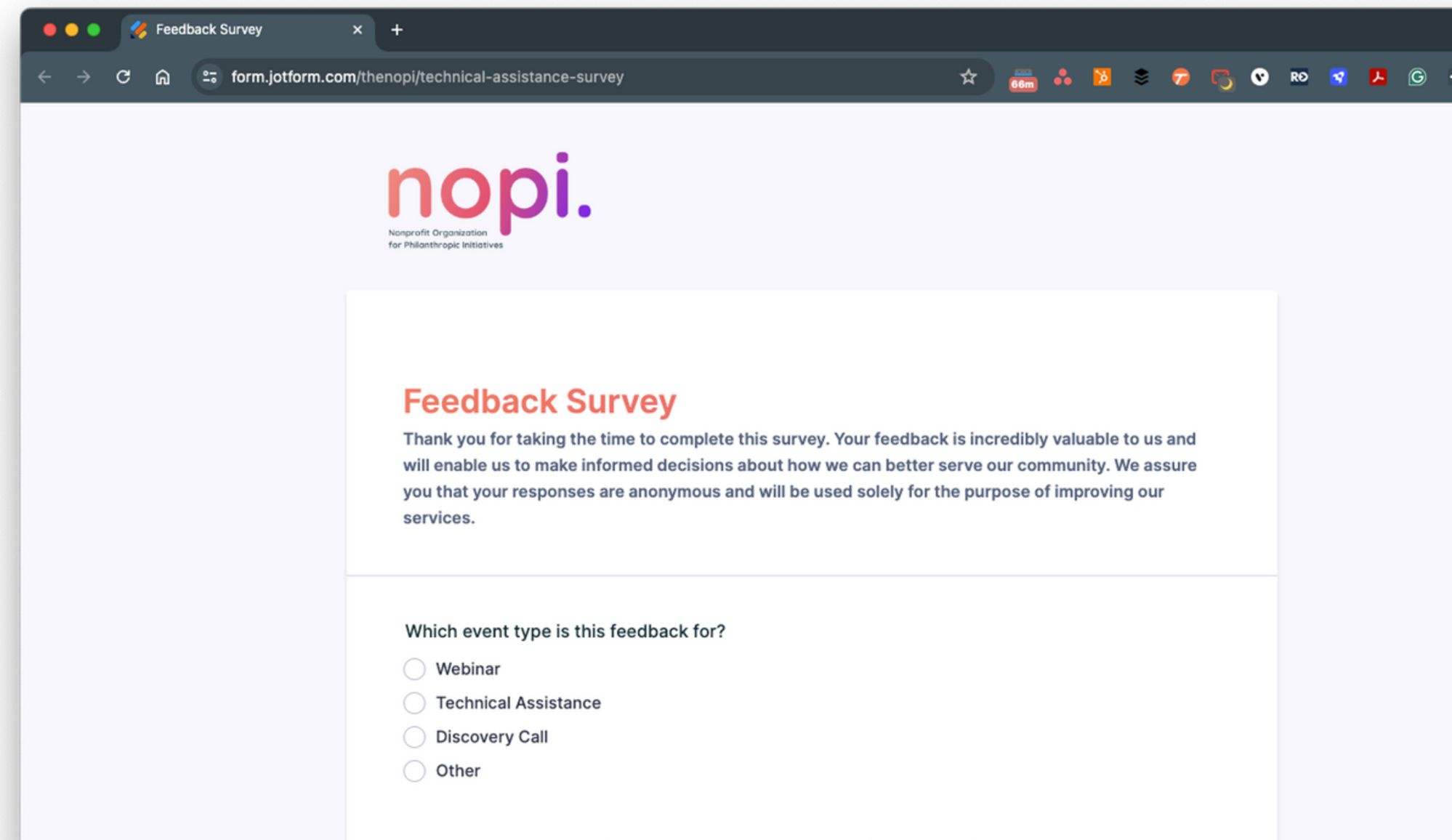
**Client Manager, AHT Insurance**

[express@ahtins.com](mailto:express@ahtins.com)

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# Feedback Surveys & Impact Measurement

Your feedback is incredibly valuable to us and will enable us to make informed decisions about how we can better serve our community. We assure you that your responses are anonymous and will be used solely for the purpose of improving our services.



The image shows a browser window displaying a feedback survey form. The browser's address bar shows the URL `form.jotform.com/thenopi/technical-assistance-survey`. The page features the **nopi.** logo (Nonprofit Organization for Philanthropic Initiatives) at the top. The main heading is **Feedback Survey**. Below the heading is a thank-you message: "Thank you for taking the time to complete this survey. Your feedback is incredibly valuable to us and will enable us to make informed decisions about how we can better serve our community. We assure you that your responses are anonymous and will be used solely for the purpose of improving our services." The first question is "Which event type is this feedback for?" with four radio button options: "Webinar", "Technical Assistance", "Discovery Call", and "Other".

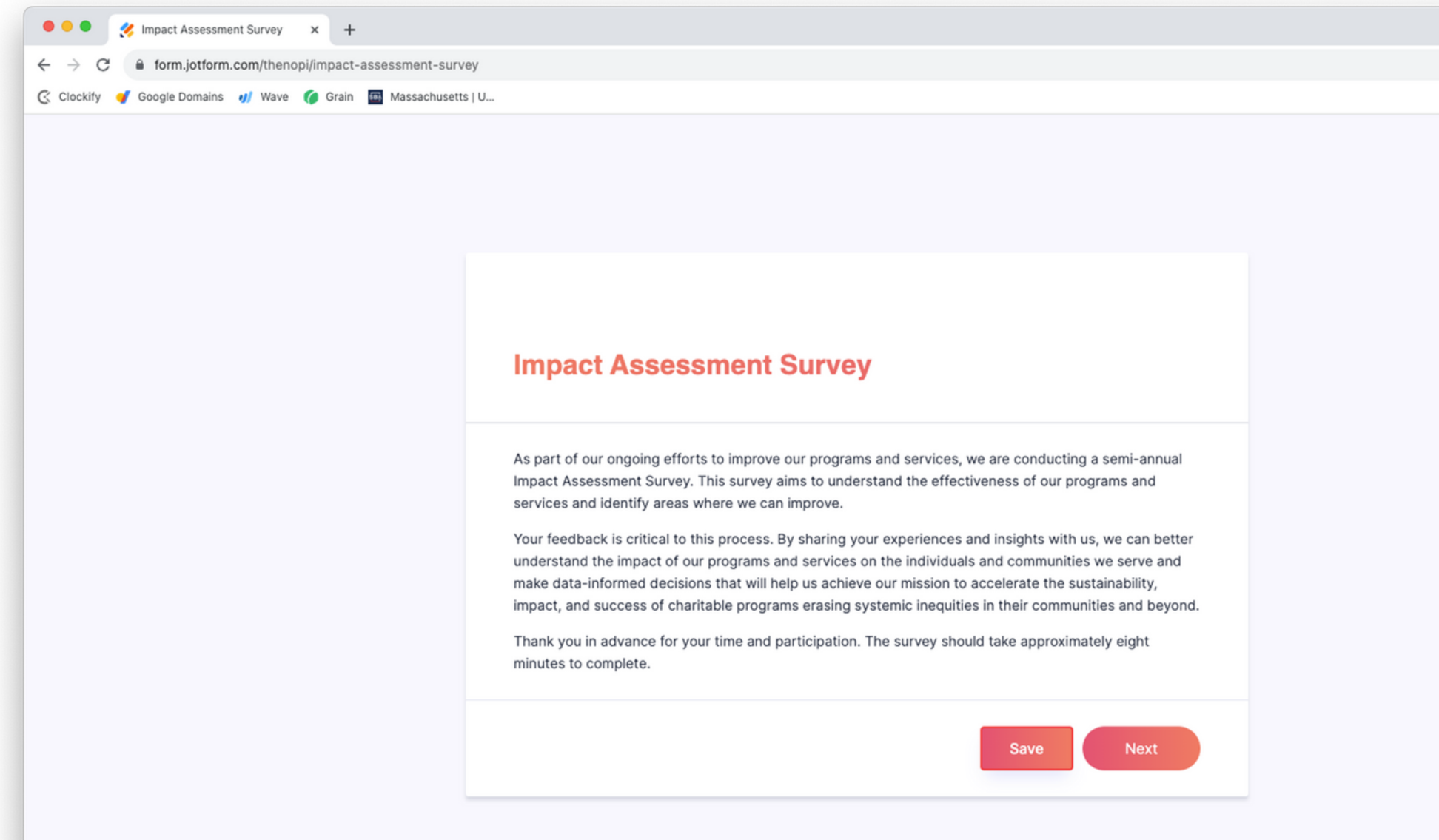


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# Feedback Surveys & Impact Measurement

By measuring impact, we increase our likelihood of receiving grant funding for NOPI and you!

Most funders require impact measurement in their selection process.



The screenshot shows a web browser window with the title "Impact Assessment Survey" and the URL "form.jotform.com/thenopi/impact-assessment-survey". The browser's address bar also shows "form.jotform.com/thenopi/impact-assessment-survey" and the page title "Impact Assessment Survey". The browser's address bar also shows "form.jotform.com/thenopi/impact-assessment-survey". The browser's address bar also shows "form.jotform.com/thenopi/impact-assessment-survey".

**Impact Assessment Survey**

As part of our ongoing efforts to improve our programs and services, we are conducting a semi-annual Impact Assessment Survey. This survey aims to understand the effectiveness of our programs and services and identify areas where we can improve.

Your feedback is critical to this process. By sharing your experiences and insights with us, we can better understand the impact of our programs and services on the individuals and communities we serve and make data-informed decisions that will help us achieve our mission to accelerate the sustainability, impact, and success of charitable programs erasing systemic inequities in their communities and beyond.

Thank you in advance for your time and participation. The survey should take approximately eight minutes to complete.

[Save](#) [Next](#)

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# What We Cover Today

- Models of Fiscal Sponsorship
- Project transfers\*
- Compliance
- Fundraising tools
- Employment and benefits
- Payroll
- Expenses
- Accounting procedures
- Fund transfers\*
- Volunteer recruitment platforms
- Grant readiness and tools
- Discounted and donated resources and more!

\* not all will apply to your program or organization

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# Benefits of Fiscal Sponsorship

Fiscal sponsorship allows emerging nonprofits to operate under an established nonprofit organization's legal and financial umbrella. This provides them with a number of benefits, including:

- The ability to accept tax-deductible donations
- Access to grant funding and other resources
- Liability protection
- Business and management support



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# Responsibilities

Fiscally sponsored programs and organizations are responsible for:

- Complying with all applicable laws and regulations
- Managing their own finances and budget (reviewing financial statements)
- Maintaining accurate records
- Submitting receipts In a timely manner
- Submitting required reports to grantmakers
- Never compromising our 501c3 status



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# Resources

NOPI provides a number of resources to its fiscally sponsored programs and organizations, including:

- Access to free and discounted technology, software, and services
- Training and workshops on nonprofit management topics
- Mentorship from experienced nonprofit professionals
- Networking opportunities with other fiscally sponsored programs and donors



# Models of Sponsorship

A, C, or F



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# Model A

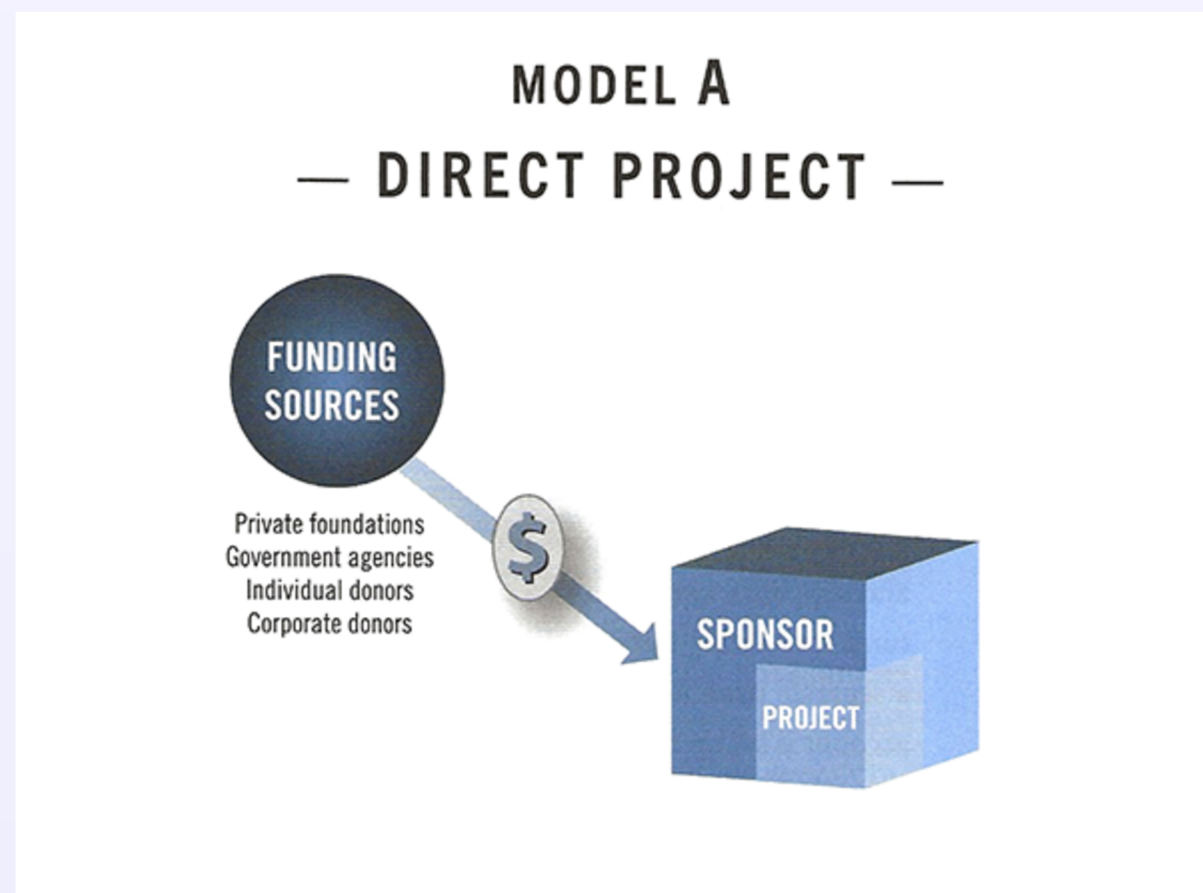
## Direct or Comprehensive

The Program is a direct program of NOPI, not a separate organization.

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# Model A

## Fiscally Sponsored Programs



## Direct or Comprehensive

### Legal Structure

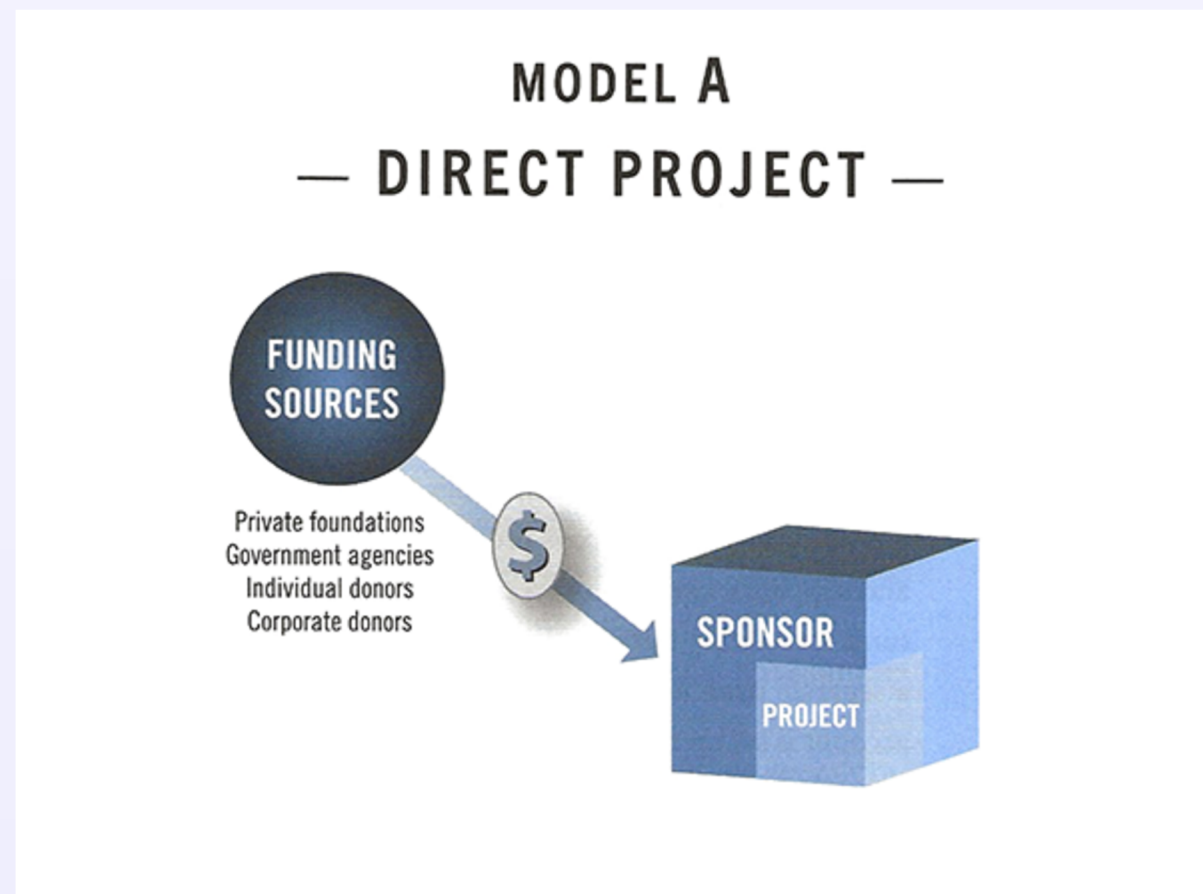
- Unincorporated
- Direct Program of NOPI
- Operate under NOPI's EIN
- Operate under NOPI's 501c3 Designation
- Operate under NOPI's insurance
- No board of directors  
may have an advisory board



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# Model A

## Fiscally Sponsored Programs



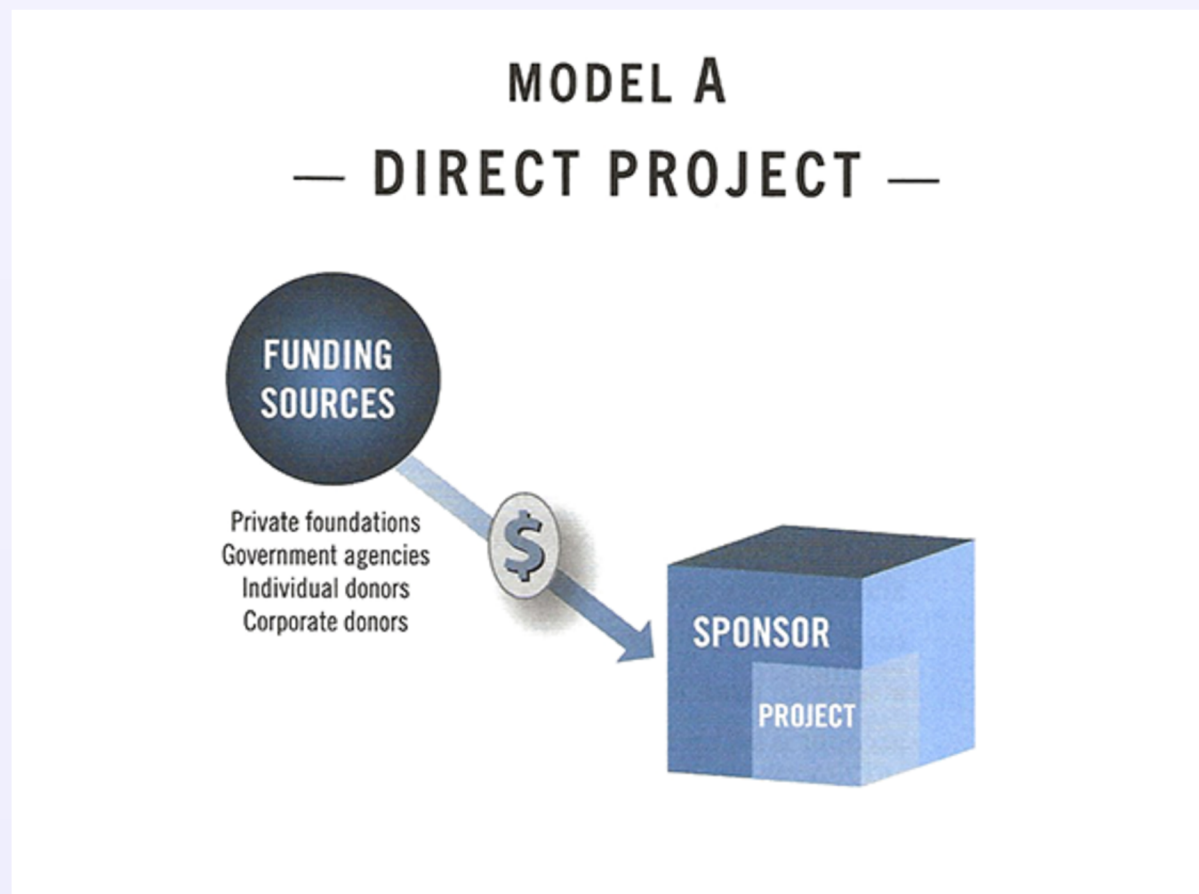
## Direct or Comprehensive Employees & Contractors

- Employees of NOPI
- Contractors of NOPI
- Under NOPI's workers comp
- Under NOPI's benefits plan

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# Model A

## Fiscally Sponsored Programs



## Direct or Comprehensive

### Funding Distribution

- Contributions made to NOPI
- 90% of contributions are designated to the program
- 10% designated to admin (min \$100/mo)

#### Is there a "fee" for fiscal sponsorship?

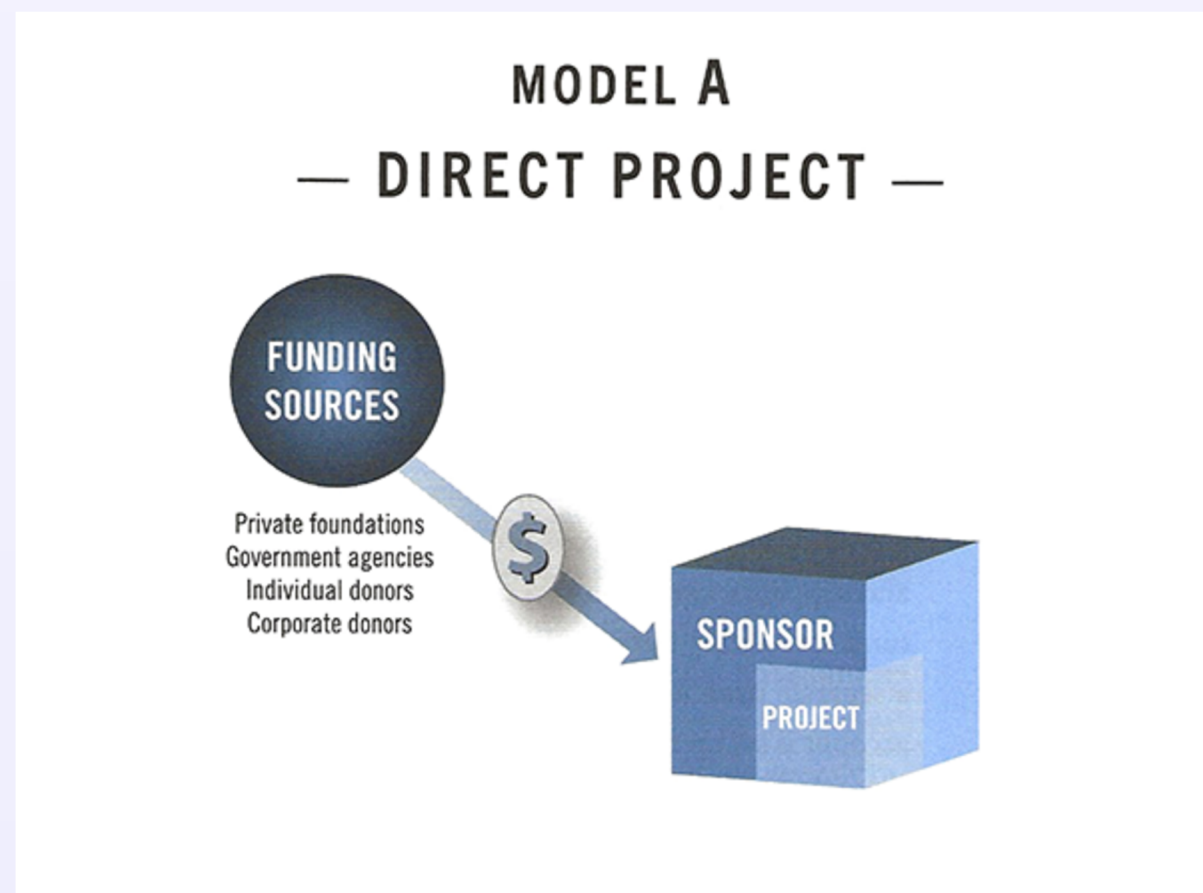
There is no fee for fiscal sponsorship. However, to support your mission, 10% of all contributions, such as donations, grants, sponsorships, and others, will cover administrative costs for your program.

[thenopi.org](https://thenopi.org)

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# Model A

## Fiscally Sponsored Programs



## Transferring Programs

- Copy of fiscal sponsor agreement
- Notice to former sponsor
- Project transfer agreement
- Funds transfer

### **Transferring from another fiscal sponsor**

Here's what happens when a project moves from one fiscal sponsor to another

[thenopi.org](https://thenopi.org)

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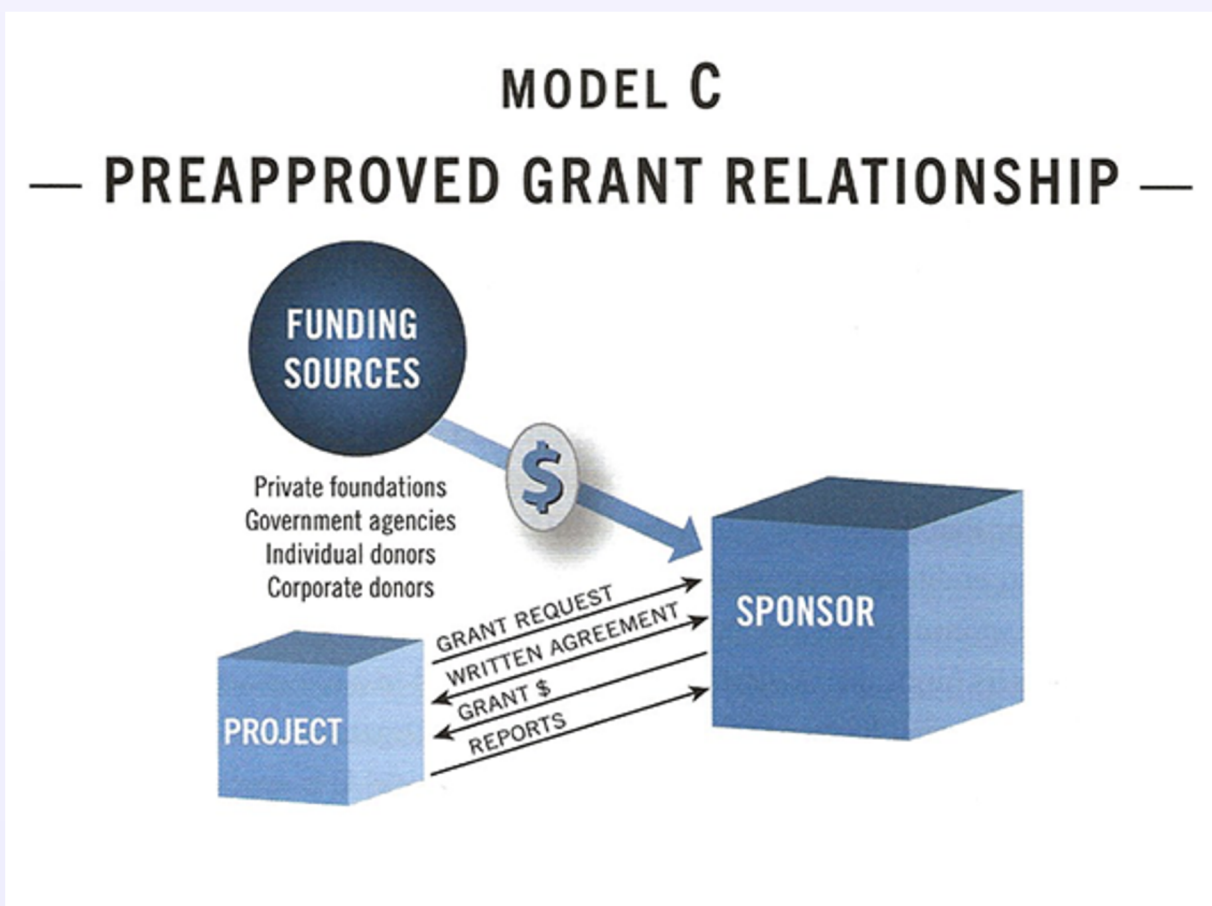
# Model C

## Pre Approved Grant

The Program is a direct program of an organization separate from NOPI.

# Model C

## Fiscally Sponsored Projects



## Pre-Approved Grant Relationship

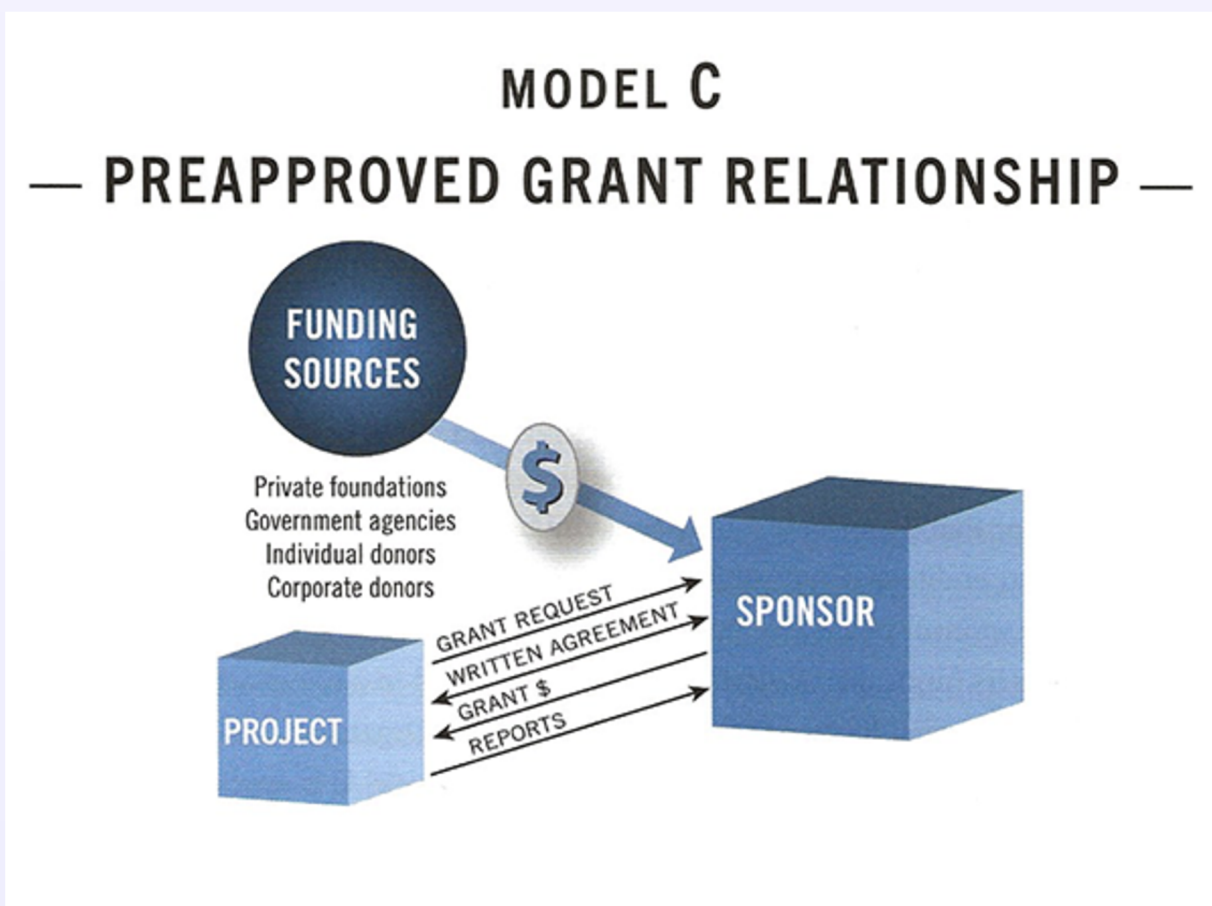
### Legal Structure

- Incorporated
- Direct program or project of a separate organization
- FSO has its own EIN
- FSO may or may not have a 501c3 Designation
- FSO has its own insurance
- FSO has a board of directors  
may also have advisory boards

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# Model C

## Fiscally Sponsored Projects



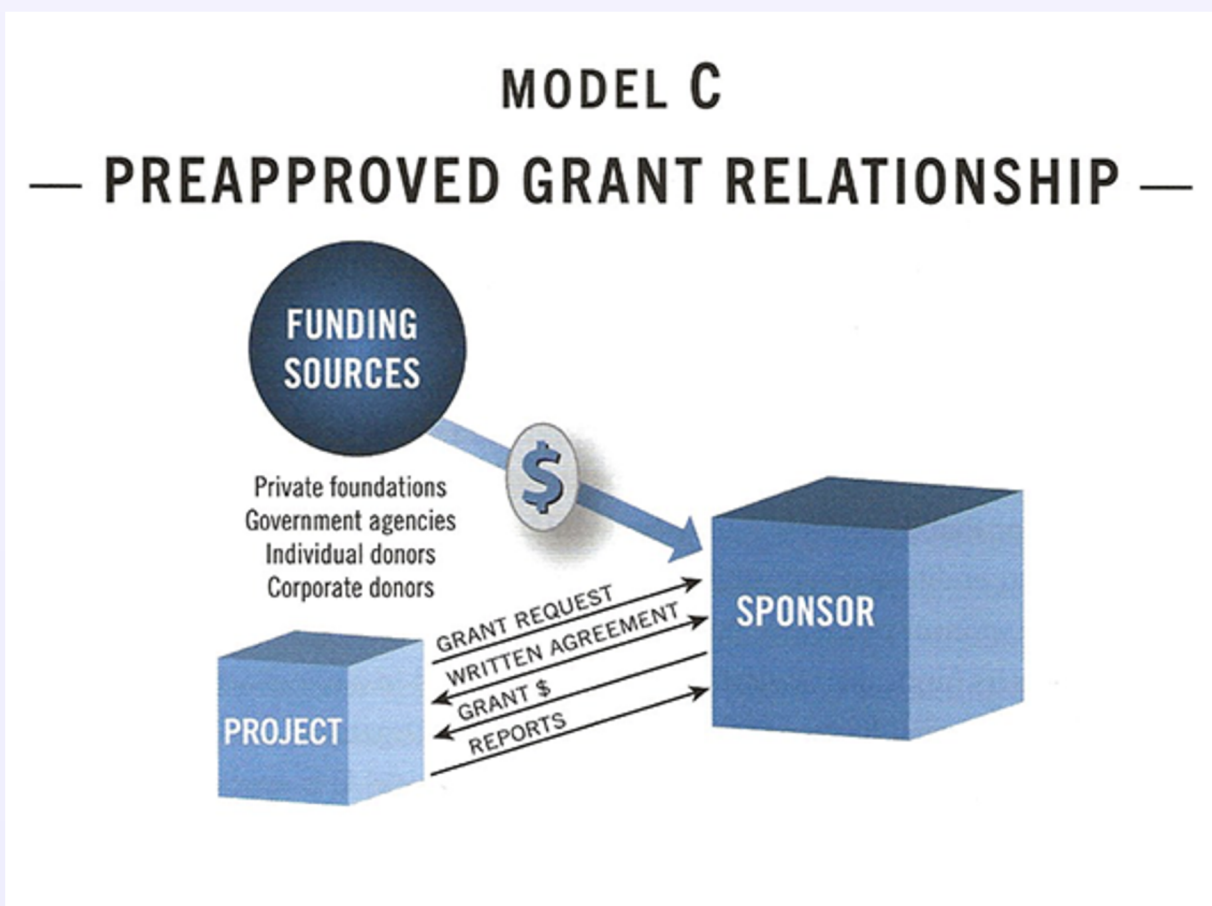
## Pre-Approved Grant Relationship

### Employees & Contractors

- Can be employees of NOPI or FSO
- Can be contractors of NOPI or FSO
- Can be under NOPI's workers comp or FSO
- Can be under NOPI's benefits plan or FSO

# Model C

## Fiscally Sponsored Projects



## Pre-Approved Grant Relationship

### Funding Distribution

- Contributions made to NOPI
- 90% of contributions are designated to the FSO
- 10% designated to admin (min \$100/mo)

#### Is there a "fee" for fiscal sponsorship?

There is no fee for fiscal sponsorship. However, to support your mission, 10% of all contributions, such as donations, grants, sponsorships, and others, will cover administrative costs for your program.

[thenopi.org](https://thenopi.org)

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# Model F

# Technical Assistance

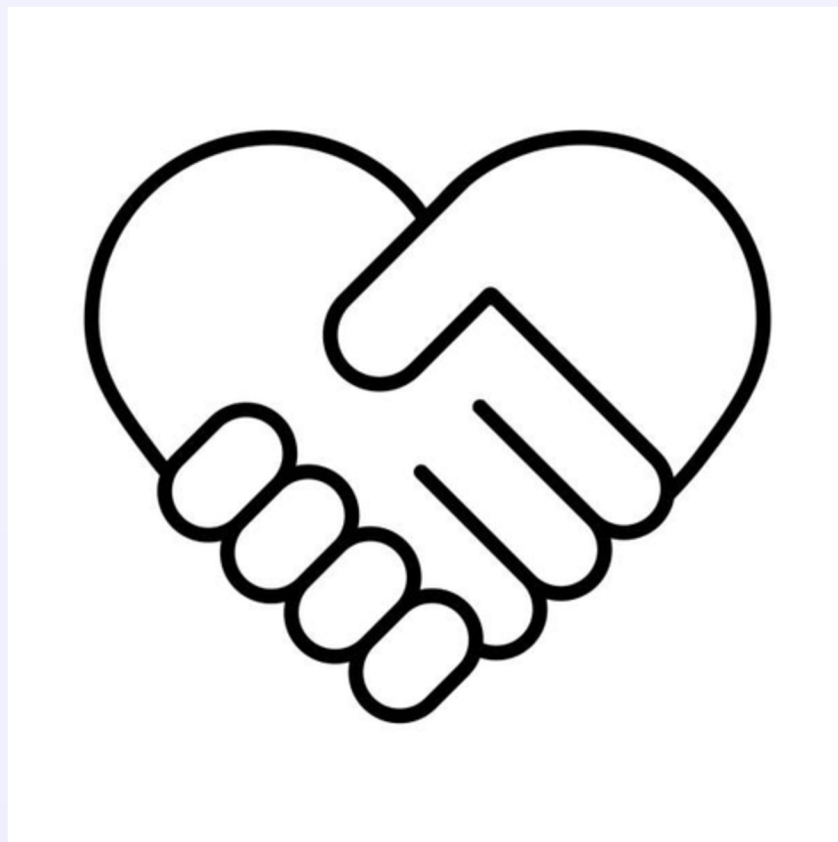
A separate organization receives technical assistance from NOPI.



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# Model F

Fiscally Sponsored Organizations



## Technical Assistance

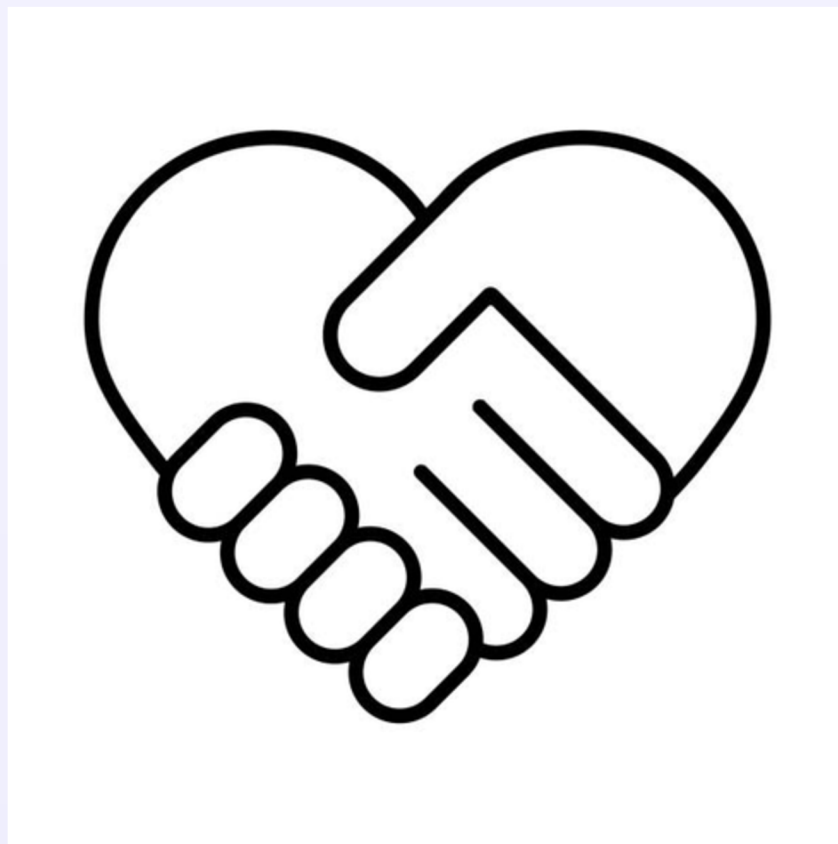
### Legal Structure

- Incorporated
- FSO has own EIN
- FSO has own 501c3 Designation
- FSO has own insurance
- FSO has a board of directors  
may also have advisory boards

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# Model F

Fiscally Sponsored Organizations



## Technical Assistance

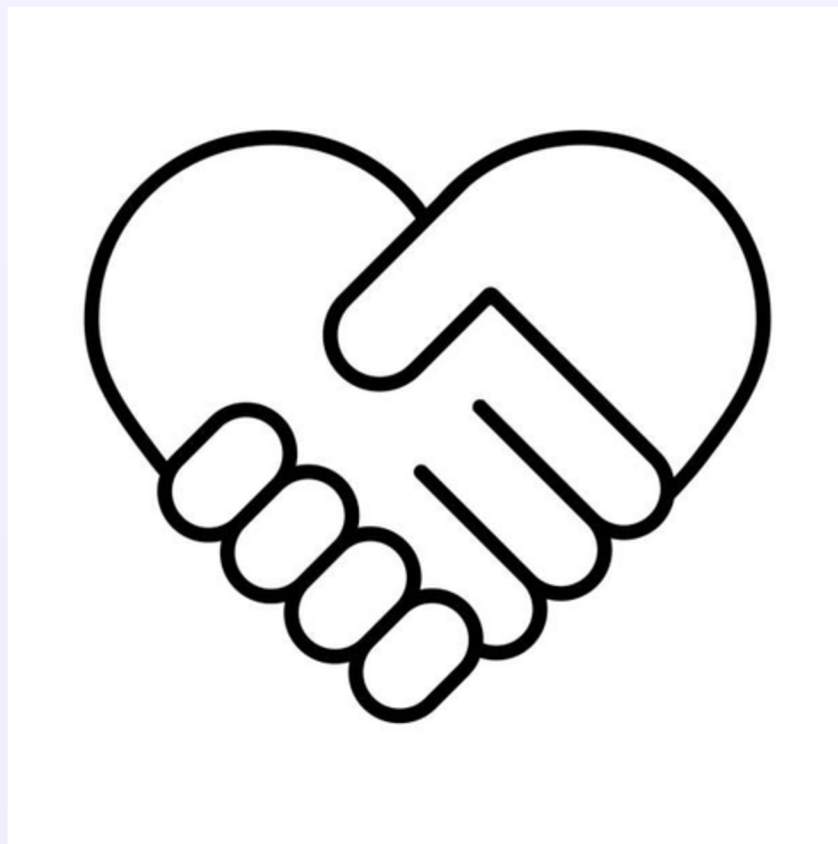
### Employees & Contractors

- Can be employees of NOPI or FSO
- Can be contractors of NOPI or FSO
- Can be under NOPI or FSO workers comp
- Can be under NOPI or FSO benefits plan

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# Model F

Fiscally Sponsored Organizations



## Technical Assistance

### Funding Distribution

- Contributions made to organization
- Sliding scale billed monthly
- Additional costs or fees may be billed monthly depending on services provided

# Tools & Resources

community of sharing

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# Software & Technology

- Free and Discounted Platforms →

Google Workspace



**Most platforms/SAAS offer nonprofit pricing, and all offer sales tax exemption. Contact us to request documents needed for your platform/s of choice.**

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# Software & Technology

- Free and Discounted Platforms →

**techsoup**



Google Workspace

Most platforms/SAAS offer nonprofit pricing and all offer sales tax exemption. Contact us to request documents needed for your platform/s of choice.

Model A	Model C	Model F
Join NOPI's account	<b>Has 501c3:</b> Create org account <b>No 501c3:</b> Join NOPI's account	Create org account
<a href="https://faq.thenopi.org/en/knowledge/join-techsoup">https://faq.thenopi.org/en/knowledge/join-techsoup</a>	<a href="https://www.techsoup.org/joining-techsoup/registration">https://www.techsoup.org/joining-techsoup/registration</a>	<a href="https://www.techsoup.org/joining-techsoup/registration">https://www.techsoup.org/joining-techsoup/registration</a>
Some SAAS like Google Workspace and <a href="#">Zoom</a> must be requested through us directly and not through TechSoup.		

TechSoup supports nonprofits, charities, and libraries by providing access to donations and discounts on software, hardware, and services from major brands.

Admin fees charged by TechSoup are deducted as a program expense or billed back to the organization.



**Join TechSoup**

FSOs may utilize our TechSoup membership for discounted and donated hardware, software, and Software as a service (or SaaS).

[thenopi.org](https://thenopi.org)

Model A	Model C	Model F
<p><b>Option 1:</b> Join NOPI's account:  <a href="#">Click here to request access</a></p>	<p><b>With 501c3:</b> Apply for nonprofit discount through <a href="#">TechSoup</a></p>	<p>Apply for nonprofit discount through <a href="#">TechSoup</a></p>
<p><b>Option 2:</b> Apply NOPI's discount to an existing Zoom account:  <a href="#">Click here to request instructions</a></p>	<p><b>Without 501c3:</b> See Model A option 1 and 2</p>	<p>Once account is approved by TechSoup, <a href="#">buy Zoom discount here</a></p>
<p><b>Sales Tax Exemption:</b> <a href="#">Add NOPI's Sales Tax Exemption to an existing account →</a></p>	<p><b>Sales Tax Exemption:</b> Your org or ours depending on 501c3 status  <a href="https://support.zoom.us/hc/en-us/articles/208186963-Tax-exemption">https://support.zoom.us/hc/en-us/articles/208186963-Tax-exemption</a></p>	<p><b>Sales Tax Exemption:</b> Your org or ours depending on 501c3 status  <a href="https://support.zoom.us/hc/en-us/articles/208186963-Tax-exemption">https://support.zoom.us/hc/en-us/articles/208186963-Tax-exemption</a></p>

Zoom, [Microsoft Teams](#), and [Google Meet](#) are popular video conferencing platforms that offer free plans for nonprofits. Model A FSPs must request access to join our video conference tools, while some Model Cs and Model F FSOs will need to acquire their own accounts.

Subscription fees are deducted as a program expense or billed back to the organization.





Model A	Model C	Model F
<b>Option 1:</b> Join NOPI's account: <a href="#">Click here to request access</a>	<b>With 501c3:</b> Apply through <a href="#">Canva for Nonprofits</a>	Apply through <a href="#">Canva for Nonprofits</a>
<b>Sales Tax Exemption:</b> Already included	<b>Without 501c3:</b> Join NOPI's account <a href="#">here to request access</a>	<b>Sales Tax Exemption:</b> Your org's <a href="https://www.canva.com/help/tax-exempt-invoice/">https://www.canva.com/help/tax-exempt-invoice/</a>
	<b>Sales Tax Exemption:</b> You org or ours depending on 501c3 status <a href="https://www.canva.com/help/tax-exempt-invoice/">https://www.canva.com/help/tax-exempt-invoice/</a>	

Canva is an easy-to-use online graphic design tool. Use it to create social media posts, presentations, posters, videos, logos and more. Model A FSPs must request access to join our video conference tools, while some Model Cs and Model F FSOs will need to acquire their own accounts.

License fees and printing costs are deducted as a program expense or billed back to the organization.



Model A	Model C	Model F
Join NOPI's account: <a href="#">Click here to request access</a>	<b>With 501c3:</b> <a href="#">Apply for the Google Nonprofit Grant</a>	<b>With 501c3:</b> <a href="#">Apply for the Google Nonprofit Grant</a>
	<b>Without 501c3:</b> Join NOPI's account: <a href="#">Click here to request access</a>	

Help your nonprofit or charitable program collaborate more effectively with smart, secure business apps like Gmail, Docs, Calendar, Drive, and Google Meet. The Google Grant for Nonprofits has many benefits including a generous \$10,000 per month Google Ad spend.

Google Workspace



# **Accounting & Finance**

money in & money out



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# Fiscal Sponsorship: Holistic Financial Oversight

- **Bill Spend & Expense.** Corporate credit cards for day-to-day expenses, self-serve reimbursement for out-of-pocket and mileage, expense management and receipts
- **Quickbooks Online.** Itemized tracking of all expenses from credit cards, bill pay, revenue, and payroll. Itemized financial statements can be emailed weekly, semi-monthly, or once a month.
- **Givebuttr.** Online fundraising tools, donor management, donor relations and communication.



# Expenses & Receipts

Follow the simple steps below to categorize program-related expenses charged to your Bill Spend (Divvy) credit card.

1. Log in to <https://app.divvy.co/login>
2. Go to Transactions > [Pending and Cleared](#)
3. Choose the transaction
4. Add a category, budget, and grant (if applicable)
5. Add a description of the purchase
6. Upload receipts in PDF or JPG format only

Projects shall pay 6% interest accrued when a deficit exists between charges, and available funds or a receipt is not provided by the close of each month. 5 or more missing receipts will freeze a user's card.

Transaction details [More](#)

Category  
Cost of Goods Sold

Lobbying  
No  
Is this expense lobbying related?

Program

Grant/Fund  
Select...

Should this expense be deducted from a specific grant?

Billable  
No



**BILL Spend & Expense App | 4.8 star rating | Download now**

With the BILL Spend & Expense app, Spend Smarter on the go. Download BILL for iOS or Android devic...

 bill.com

# Reimbursements

Follow the simple steps below to request reimbursement for out-of-pocket, program-related expenses

- Log in to <https://app.divvy.co/login>
- Go to [Reimbursements](#)
- Select New Reimbursement > Out of Pocket, Google Maps, or Manual Entry
- Complete the form
- Add receipts in PDF or JPG format only > REQUEST

Learn more at <https://help.bill.com/direct/s/article/5530933>. Projects shall pay 6% interest accrued when a deficit exists between charges and available funds or a receipt is not provided.

## New reimbursement

Out of pocket

### Details

Merchant\*

Reimbursement amount\*

Transaction date\*

# Paying Bills & Invoices (Bill Pay)

## Paying by Credit Card

If the Vendor accepts payment by debit or credit card, please use your Divvy/Bill Spend card.

## Paying by ACH or Check

Follow the steps below to pay a vendor that does not accept credit cards. Melio.com will email the vendor, inviting them to accept payment and choose ACH or paper check.

- Go to <https://faq.thenopi.org/en/knowledge>
- Go to Accounting > [Bill Pay Request](#)
- Complete the form
- Upload a Copy of the Bill/Invoice in PDF or JPG format only
- Submit and Request Payment

Please allow up to 15 days from the day of submission for payments to arrive. Invoices must include an invoice number, name, and the vendor/contractor's email address. Projects shall pay 6% interest accrued when a deficit exists between charges and available funds.

The image shows a 'Bill Pay Request Form' with several input fields. The fields are: 'Vendor Name \*' (with a sub-label 'First and Last Name or Company Name'), 'Vendor Email \*' (with a sub-label 'example@example.com'), and 'Invoice Number \*'. A notification box is overlaid on the form, titled 'Bill Pay Request' with a green icon. The text in the box reads: 'Bill pay requests will be sent to our finance team for approval. Once approved, payment instructions will be sent to the vendor using the email below.' and includes the URL 'thenopi.org' with a globe icon. Below the notification box, the 'Explanation/Description \*' field is visible.

# Receiving Funds (Pledges)

## Givebutter Users

Instantly log pledged donations, matching gifts, and sponsorships as they are pledged.

- Go to <https://dashboard.givebutter.com>
- Go to Transactions
- Switch to the Pledges tab above the table
- Select + Add pledge and customize all the necessary details

## Non-Givebutter Users

Follow the simple steps below to request donations, sponsorships, registration fees, etc.

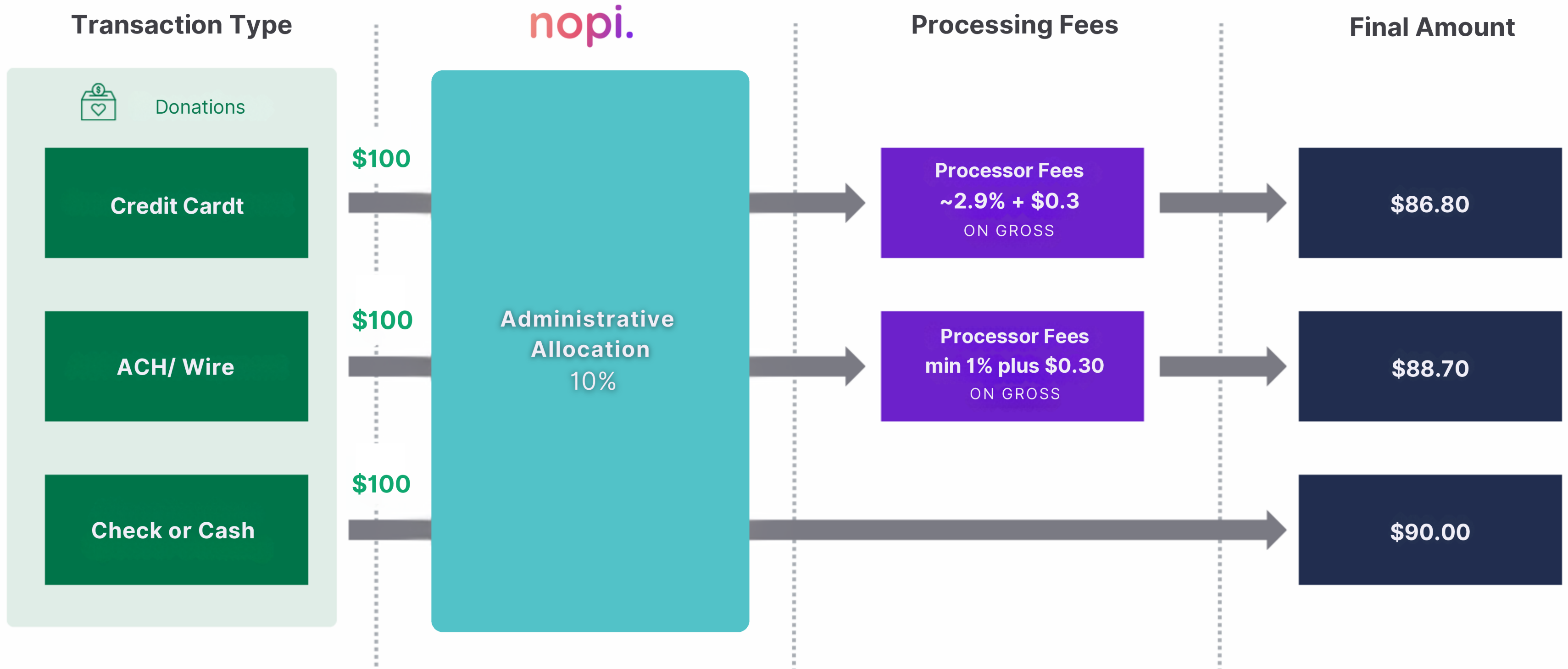
- Go to <https://faq.thenopi.org/en/knowledge>
- Go to Accounting > [Donation Request](#)
- Complete the form
- Send Donation Request

### ♥ Donation Request

Use the form below to automatically send a pledge request to a donor, or follow the steps below for Givebutter users.

thenopi.org





**Transaction Type**



Donations

**nopi.**

**Processing Fees**

**Final Amount**

**Credit Cardt**

**\$100**

**Administrative Allocation  
10%**

**Processor Fees  
~2.9% + \$0.3  
ON GROSS**

**\$86.80**

**ACH/ Wire**

**\$100**

**Processor Fees  
min 1% plus \$0.30  
ON GROSS**

**\$88.70**

**Check or Cash**

**\$100**

**\$90.00**

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# Cost to Program

## Model A

**\$0** for bookkeeping

## Model C & F

**sliding scale** based on previous 990 or annual budget

\$1 to \$49,999	<b>\$250</b> per month
\$50,000 to \$99,999	<b>\$350</b> per month
\$100,000 - \$150,000	<b>\$400</b> per month
\$150,000 - \$250,000	<b>\$500</b> per month

## A/R & A/P Fees

- **\$25** International payments
- **1%** ACH bank transfer (max \$10)
- **\$1.50** Paper check
- **2.2% + 30 ¢** Stripe
- **2.4% + 25 ¢** Credit card - swiped
- **2.9% + 25 ¢** Credit card - online invoice
- **3.4% + 25 ¢** Credit card - keyed
- **1%** Instant deposit

Source: <https://quickbooks.intuit.com/learn-support/en-us/help-article/bank-transactions/fees-quickbooks-payments>

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# Sales Tax Exemption

**All FSPs and FSOs are eligible for sales tax exemption** on all program-related purchases and subscriptions. Because **recouping sales tax after it's been paid can be time-consuming** (and sometimes impossible), an **approved vendor list** for your team can be very helpful. This ensures that each vendor has a copy of your organization's (FSOs) or our (FSPs) sales tax exemption on file.



## Sales Tax Exemption

Fiscally sponsored programs are exempt from sales tax on program-related expenses.

[thenopi.org](https://thenopi.org)

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# Payroll

NOPI is the employer of record (EOR) for our Model A FSOs and some of our Model C & F FSOs. Program Directors must [register new Employees and Independent Contractors](#) before payroll can begin.

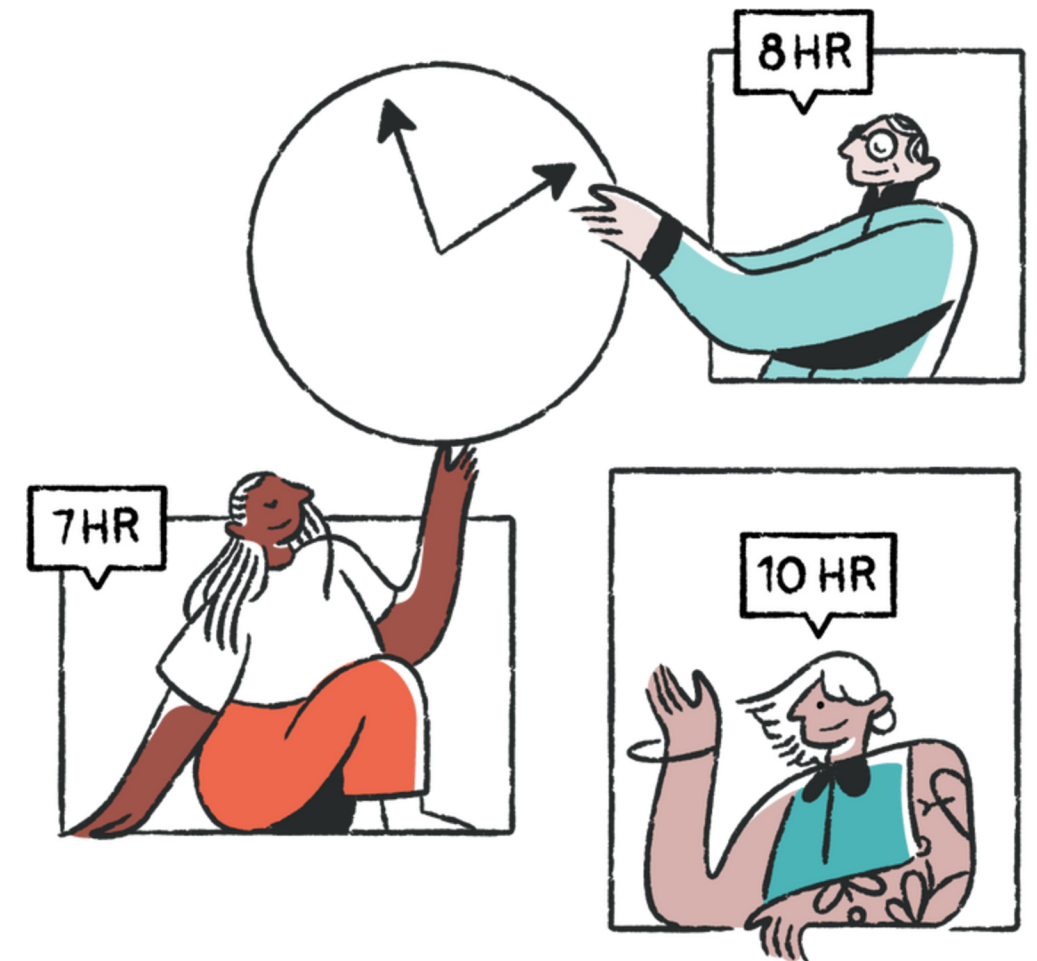
- Employees

[Paid via Gusto →](#)

- Independent Contractors

[Email invoices to accounting@thenopi.org →](mailto:accounting@thenopi.org)

All payroll must be approved by a Program Director



# Expense Reports

- Emailed on the 5th and 15th of every month to designated team members.
- Changes may occur between reports as our team reconciles charges and transactions.
- Directors must review these documents carefully to verify the accuracy of income and expenses.

## Our World Is One Statement of Activity Detail All Dates

NAME	MEMO/DESCRIPTION	AMOUNT
Ordinary Revenue/Expenditures		
Revenue		
Contributions		
Corporate		
09/20/2023	Melvins Welding INC	2,000.00
09/21/2023	10%	(200.00)
09/21/2023	Admin	200.00
Total for Corporate		\$2,000.00
Foundation/Grants		
Admin		
07/21/2022	WorksFirst	47,500.00
07/29/2022	Grant disbursement/funds transfer \$200 onboarding admin allocation, New Venture Fund:Cultivate Pathways Catalyze Challenge Grant 11/1/2021–10/31/2022	(200.00)
07/31/2022	5% Admin Allocation - Cultivate Pathways Catalyze Challenge Grant 11/1/2021–10/31/2022	(2,375.00)
09/21/2022	6% Admin Allocation - New Venture Fund:Cultivate Pathways Catalyze Challenge Grant 8/1/22 – 7/31/24	(22,500.00)
09/21/2022	New Venture Fund:Cultivate Pathways Catalyze Challenge Grant 8/1/22 – 7/31/24	375,000.00
08/15/2023	Disbursement 1: New Venture Fund:Cultivate Pathways Catalyze Challenge Grant 8/1/22 – 7/31/24	
09/07/2023	10% Admin	(1,485.87)
09/07/2023	6% Admin Allocation - New Venture Fund:Cultivate Pathways Catalyze Challenge Grant 8/1/22 – 7/31/24	(7,500.00)
09/07/2023	New Venture Fund:Cultivate Pathways Catalyze Challenge Grant 8/1/22 – 7/31/24	125,000.00
Total for Foundation/Grants		
Total for Contributions		\$513,439.13
Total for Revenue		\$515,439.13
Expenditures		
Other Expenses		
Advertising & Marketing		
09/19/2022		
09/19/2022	Creation of website for promoting organization (year membership)	114.75
Total for Advertising & Marketing		20.00
Bank Charges & Fees		
07/20/2022	QuickBooks Payments	\$134.75
06/21/2023	Melio	
07/05/2023	Melio	
08/14/2023	Melio	
08/18/2023	Melio	
09/12/2023	Melio	
09/26/2023	Melio	
	System-recorded fee for QuickBooks Payments. Fee-name: DiscountRateFee, fee-type: Daily.	10.00
	Check fee	1.50
	Andres Ocampp	1.50
	Rocio Garcia Check	1.50
	Michele Rudy Check	1.50
	Mary L Smith Check	1.50

# **Fundraising** grants and donations



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## Grant Resources

**instrumentl**

Instrumentl is \$10 per month, per user (reg \$162 per month) paid annually. [Click here to request access](#)

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## Donations



**Givebutter**



**Double the Donation**  
matching gifts made easy

**Chariot**

Givebutter is a free online fundraising tool with the option for donors to cover the platform fees. Please do not create an account. We will set this up for you.

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## Service/Event Fees

- Technical Assistance
- Event Sponsorship
- Consulting
- Event Vendors
- Participation Fees

Donated and discounted fees must have an equitable application and tracking process to ensure that they are distributed fairly and that their impact can be measured.

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## In-Kind Contributions



Create a free account at

[catalog.good360.org/marketplace/sign-in](https://catalog.good360.org/marketplace/sign-in)

[Report in-kind donations here](#)



# HR & Payroll

## growing your team

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# Costs

## Variables

- Workers compensation
- 3% contribution on 401(k)
- Benefit contributions
- Payroll taxes

## Add-ons

- Health premium stipend
- Home office stipend
- Cell phone stipend

### Hire an Employee

All employees hired by fiscally sponsored organizations are considered employees of NOPI.

 [thenopi.org](https://thenopi.org)

## \$50 per team member

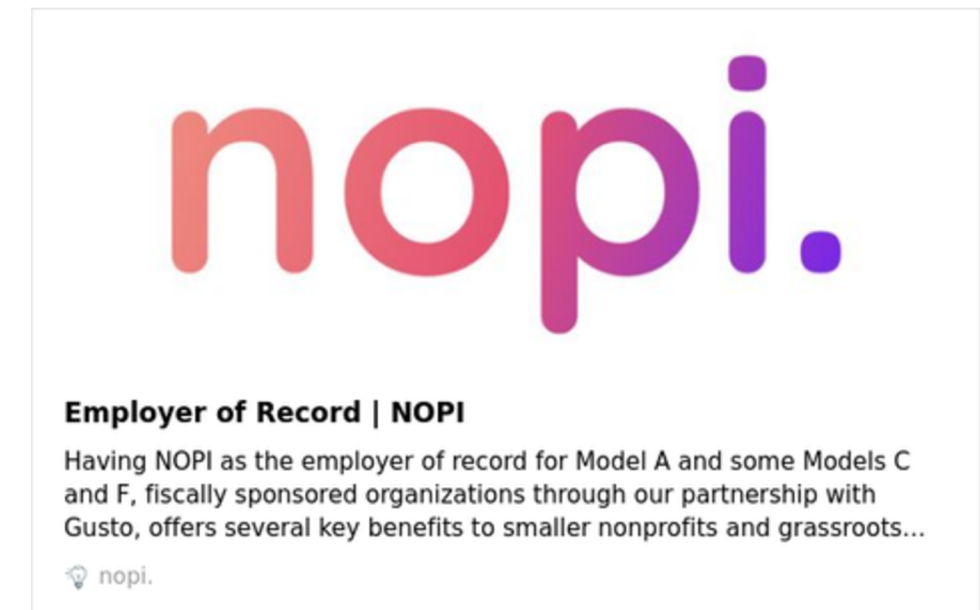
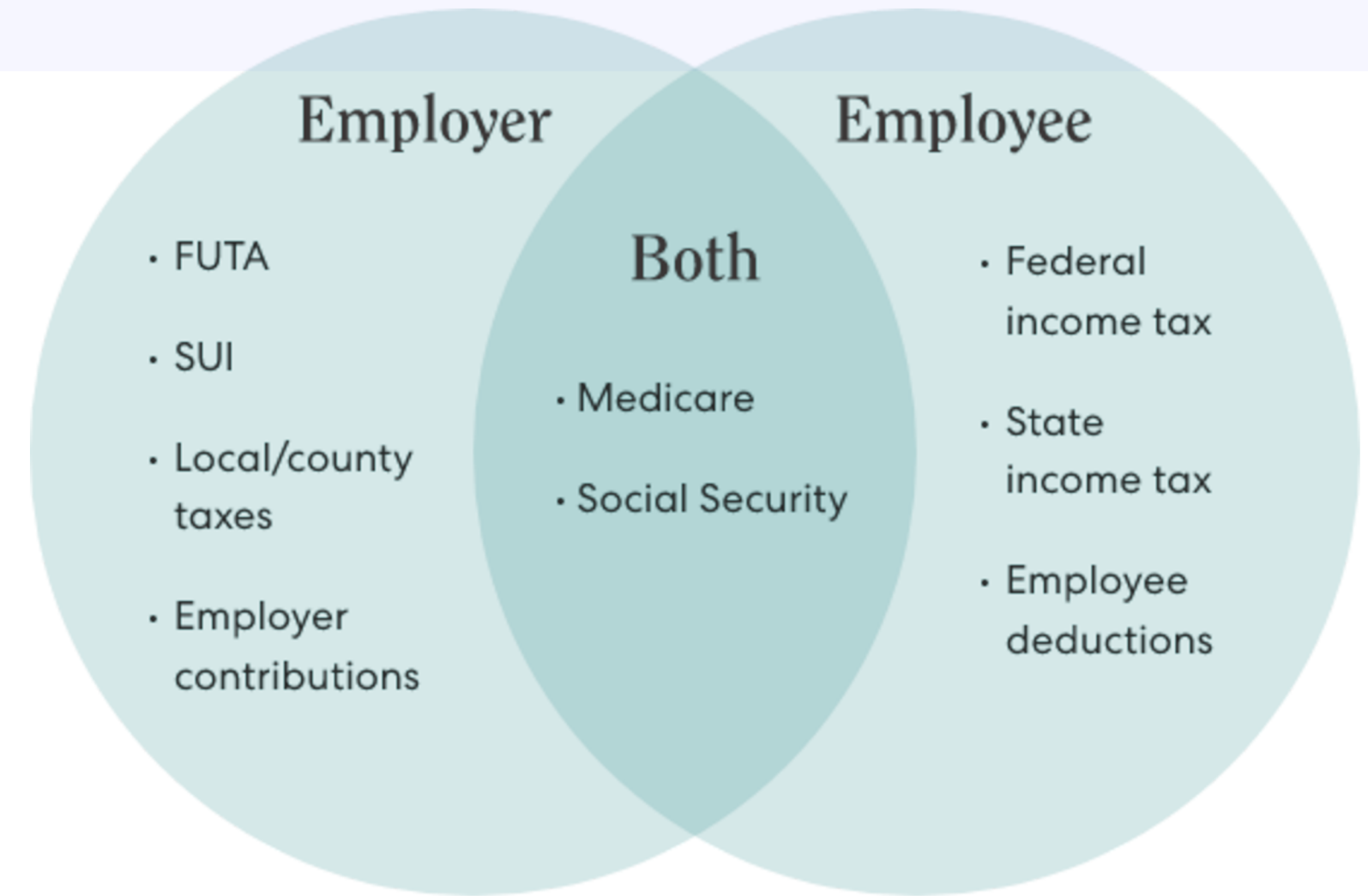
per month for Model A; 1% of employee compensation (min \$50/employee per month) for Model C & F.

- **Time tracking** system and reporting
- **Payroll processing** on the 1st and 15th
- **Direct deposit** or +\$1.50 per check
- **Compliance** HR, withholding, I9, W4, W2, paystubs, etc.
- **Access to benefits** including medical, dental, vision, discount plan, and 401(k)\*
- **Flexible PTO** and paid holidays

RV 10/2022 | NOPI - Nonprofit Incubator

# Payroll Taxes

- Sponsorees are responsible for employer taxes for the locality and state where the employee lives and works
- NOPI handles all federal, state, and local compliance
- Sponsorees are exempt from FUTA



[New Hire Cost Calculator →](#)

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# Benefits

Employees are eligible for benefits 30 days after hire.

- Gusto Wallet app
- Medical
- 401(k)
- Dental
- Vision
- Basic Life
- Long-Term Disability
- Flexible PTO
- Paid Holidays



# Cost of Benefits

Contributions are pre-tax. Programs may choose to reimburse employees after taxes for premiums, cell phone, travel, and more. Benefits begin after the 1st of the month, 30 days after hire. Dismissed employees receive benefits through the last day of the month, on or after termination



Benefit	Employee Pays	Program Pays
<b>Medical*</b>	0% of premium 100% for dependents  0% of premium for employee 100% of premium for dependents After Jan 1, 2024	100% of premium tier 1 plan ranges \$600-\$800  0% of premium for employee 100% of premium for dependents After Jan 1, 2024
<b>Dental*</b>	\$53.78 per month	\$0
<b>Vision*</b>	\$9.36 per month	\$0
<b>401K</b>	Optional contribution	3% of compensation
<b>Basic Life</b>	\$0	\$8.50 per month
<b>Long-term Disability</b>	0%	100% of premium

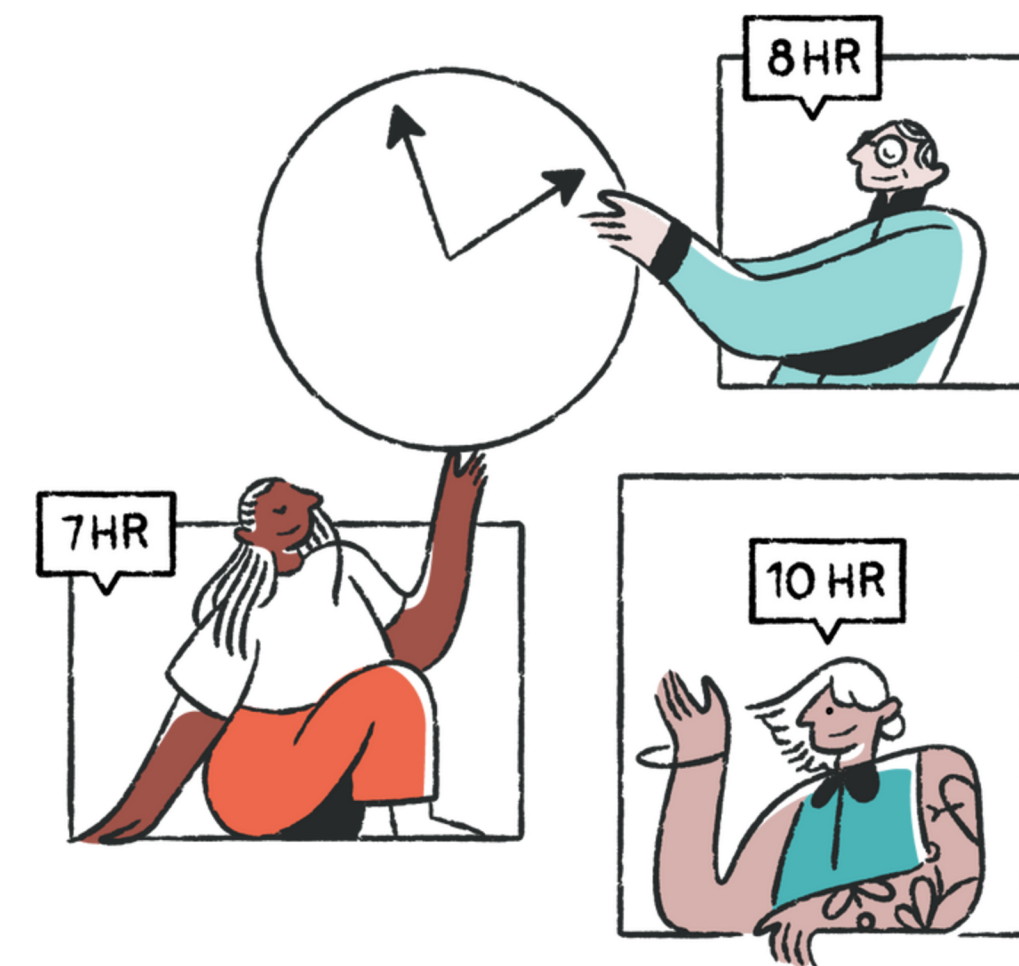
\*Benefit is subject to federal COBRA and state continuation after termination of employment ends.

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# Flexible PTO

We work hard but also believe that taking time off is personally and professionally essential. We do not limit the number of sick and vacation days employees may take during the year. Team members are expected to balance their work and time off appropriately.

PTO can be taken for various reasons, including planned vacations, personal days off, illness, bereavement, etc. Flexible PTO is a means to encourage the work-life balance and workplace flexibility we are known for.



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# Paid Holidays

- New Year's Day
- Martin Luther King, Jr. Day
- Presidents' Day
- Memorial Day
- Juneteenth
- Independence Day
- Labor Day
- Indigenous Peoples Day
- Veterans Day
- Thanksgiving
- Day After Thanksgiving
- Winter Break (12/25 - 12/31)

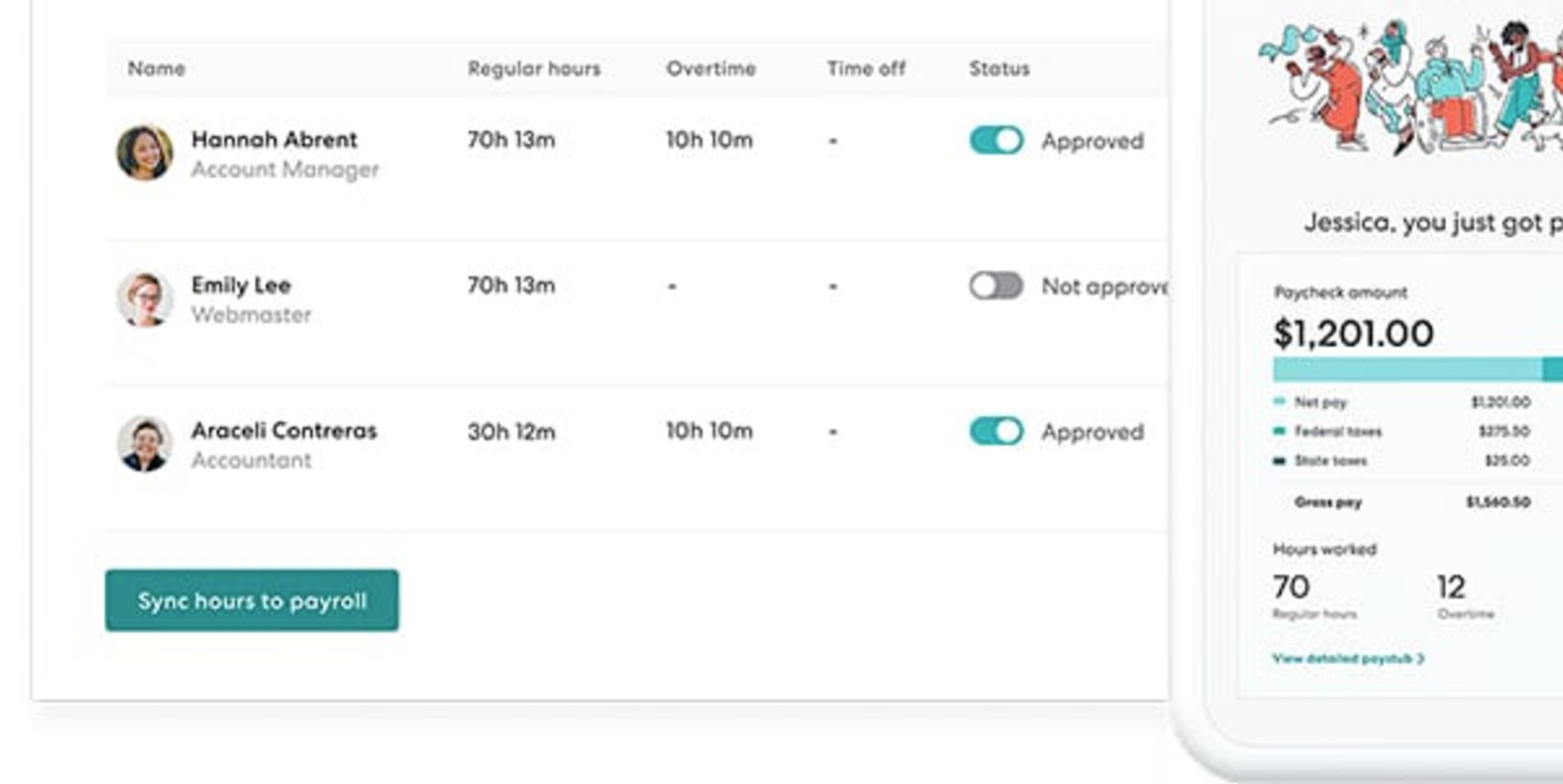


# Time Tracking

1. Accept our email invite to Gusto
2. Download the Gusto Wallet mobile app or log in online →
3. Log time as an employee, or contractor →

\*Volunteers track time in Clockify.

\*\* Exempt employees do not track time.



### Download the Gusto Wallet mobile app

If your employer uses Gusto, you get access to the free Gusto Wallet app. It's a smart new way to track, save, and access your hard earned money

Gusto / Oct 3



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# Common Questions

**What paperwork do employees need to complete?**

W4, I9, Confidentiality Agreement, eWorkplace Policy, and a Non-Solicitation Agreement

**Do employees submit an invoice?**

No. Non-exempt employees will track their time in our time-tracking system. Supervisors will approve time prior to each payroll.

**How often is payroll?**

Pay days are direct deposit on the 15th and last day of each month.

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# Common Questions

**How are pay stubs and W2s distributed?**

Gusto Wallet is a free platform that allows employees to complete their W4 and I9 online, access pay stubs and W2s, and set up an interest bearing checking account. [Download Gusto Wallet →](#)

**Anything else we should know?**

As we employ across the United States and labor laws vary state by state, we practice due diligence on a state by state basis for our on-site and remote workers. [Access Labor Law ePosters →](#)



Please send your questions to [hr@thenopi.org](mailto:hr@thenopi.org)

# **Insurance**

protecting assets & managing risk



	Model A	Model C	Model F
<b>Directors &amp; Officers</b>	✓	✗	✗
<b>General Liability</b>	✓	?	✗
<b>Professional Liability</b>	✓	?	✗
<b>Special Event Coverage</b>	<a href="#">Special Event Link</a>		

Additional coverage is required at cost for activities that involve vehicles, children, medical care, water, or horses. Incorporated entities may need additional coverage. We will be sure to email you an insurance assessment form after this onboarding.



Please send your insurance questions to [compliance@thenopi.org](mailto:compliance@thenopi.org).



# Technical Assistance

signposting, consulting, &  
volunteers



	Model A	Model C	Model F
<b>Bookkeeping</b>	✓	*	*
<b>HR &amp; Payroll</b>	✓	*	*
<b>State Filings</b>	✓	*	*
<b>Federal Filings (990)</b>	✓	*	*
<b>Fundraising Plan</b>	*	*	*
<b>Strategic Plan</b>	*	*	*
<b>Website Building/Support</b>	✓	*	*
<b>Google Grant</b>	✓	*	*
<b>Incorporation</b>	✓	*	*
<b>501c3 Application</b>	✓	*	*

\* limited pro bono or sliding scale support available

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# Pro Bono Support & Volunteers



- Model F and Model Cs with 501c3 designation may [apply for a standalone Catchafire account.](#)
- All others will be invited to our Catchafire. [Click here to request access.](#)
- [Click here to request access](#) to Catchafire, taproot, and Benevity

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# Find it in the Knowledge Base

Access the FAQ →

