



501c3.APP



# MISSION STATEMENT WORKSHEET

Your Roadmap to a  
Powerful, IRS-Approved  
Mission Statement



# WHY THIS MATTERS

Your mission statement is the foundation of your 501(c)(3) application. The IRS will review it closely to determine if you qualify for tax-exempt status. This worksheet will help you craft a mission statement that clearly communicates your purpose while meeting all IRS requirements.

## WHAT MAKES A GREAT 501(C)(3) MISSION STATEMENT?

- ✓ **Clear charitable purpose** - Must explicitly serve public good
- ✓ **Specific enough** to guide your work
- ✓ **Broad enough** to allow growth
- ✓ **IRS-compliant language** that demonstrates exempt purpose
- ✓ **Memorable and inspiring** for donors and volunteers

## COMMON MISTAKES TO AVOID

- ✗ Being too vague (“help the community”)
- ✗ Being too narrow (limiting future programs)
- ✗ Missing exempt purpose language
- ✗ Including non-exempt activities
- ✗ Making it too long or complex

# BUILD YOUR MISSION STATEMENT



## STEP 1 - DEFINE YOUR “WHAT”

**What problem are you solving?**

*Example: Youth in underserved communities lack access to STEM education*

**What activities will you do?**

*Example: Provide free coding classes, mentorship, and technology access*

## STEP 2 - DEFINE YOUR “WHO”

**Who do you serve?** (Be specific but not too narrow)

*Example: Middle and high school students in low-income neighborhoods*

**What geographic area?**

*Example: Greater Chicago area*

## STEP 4 - DEFINE YOUR “WHY”

**What change will you create?**

*Example: Increase college readiness and career opportunities in technology*

**How does this benefit the public?**

*Example: Creates path to economic mobility and addresses tech talent shortage*

# BUILD YOUR MISSION STATEMENT



## STEP 5 - ADD MAGIC IRS WORDS

Select your primary exempt purpose category:

- ☐ Educational - teaching, training, instruction
- ☐ Charitable - relief of poor, distressed, underprivileged
- ☐ Scientific - research, data collection, publication
- ☐ Literary - publishing, writing, reading promotion
- ☐ Religious - worship, ministry, spiritual development

Choose power phrases that apply:

- ☐ "exclusively for charitable/educational purposes"
- ☐ "to benefit the public"
- ☐ "without regard to [race/religion/gender/etc.]"
- ☐ "to provide relief to"
- ☐ "to advance education"
- ☐ "to promote"
- ☐ "to foster"

# PUTTING IT ALL TOGETHER



## FORMULA TEMPLATE

Fill in each section, then combine:

[**Organization name**] exists to [**primary action verb**] [**what you do**] for/to [**who you serve**] in [**geographic area**] by [**how you do it**] in order to [**impact/change created**]

## WRITE YOUR FIRST DRAFT

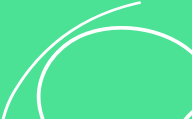
Using your answers above, write your complete mission statement (2-3 sentences):

## IRS COMPLIANCE CHECK

Review your draft. Does it:

- ☐ Use at least one exempt purpose keyword?
- ☐ Clearly describe charitable/educational activities?
- ☐ Specify who benefits?
- ☐ Avoid private benefit language?
- ☐ At or under 3 sentences?

# TEST AND ITERATE



## THE NEIGHBOR TEST

Could your neighbor understand what you do after reading this once?

- ☐ Yes. Great!
- ☐ No. Simplify the language.

## THE IRS TEST

Does it clearly state tax-exempt activities?

- ☐ Yes. You're ready!
- ☐ No. Add exempt purpose keywords.

## THE DONOR TEST

Would someone be inspired to donate after reading this?

- ☐ Yes. Perfect!!
- ☐ No. Add more impact language.

## THE BOARD TEST

Is it broad enough for future growth but specific enough to guide decisions?

- ☐ Yes. Well balanced!
- ☐ No. Add scope.

# CONGRATULATIONS!



## YOU'VE GOT YOUR MISSION STATEMENT

Now you're ready to add it to all of these important assets:



Articles of Incorporation



Website



IRS Form 1023-EZ



Grant applications



Bylaws



Fundraising materials

## NOW LET'S MAKE IT OFFICIAL

The mission statement is one of many documents you need to prepare to become an approved 501(c)(3) nonprofit organization.

The 501c3.app can help turn your mission into a real 501(c)(3) in as little as 14 days!

### 501c3.app handles everything:



All your formation documents (Articles, Bylaws, Policies)



State-specific requirements



IRS Form 1023-EZ or full 1023 application



Compliance checks to avoid costly rejections

**Found Out More online at <https://501c3.app>**

*Or send us a note at [hello@501c3.app](mailto:hello@501c3.app)*

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