

This guide is intended to assist small, start-up organizations in the formation and maintenance of a nonprofit entity. While accurate, information in this document is not intended to be comprehensive, so it is important to consult with a legal or tax professional if questions arise. (See [disclaimer](#)).

## **CHAPTER 1: BEFORE YOU BEGIN**

### *What kind of services should you provide? Who will you serve?*

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## I. Before You Begin: A Checklist [Return](#)

- \_\_\_\_\_ [Research community demographics](#) to discover the population's size and needs.
- \_\_\_\_\_ [Identify area competitors and/or organizations for possible collaboration](#) to make sure the services your nonprofit will provide are not already offered.
- \_\_\_\_\_ Based on the [needs assessment and market analysis](#), determine what your organization will provide and exactly what group or population you will serve.
  - \_\_\_\_\_ [Identify the geographic area](#) you want to serve.
  - \_\_\_\_\_ [Identify community stakeholders](#).
  - \_\_\_\_\_ [Identify sources for potential board members](#) and begin recruiting.
- \_\_\_\_\_ Draft your organization's mission statement.

## II. Introduction: Determining the Who, What, and Where of Your Organization [Return](#)

Before laying the groundwork for your nonprofit organization, you must first determine who you will serve, exactly what services you should offer, and where your organization will be located. These factors will help you to determine your organization's purpose and will eventually lead to your mission statement.

To arrive at your organization's specific mission and purpose, you should first identify the precise needs of the community where you plan to serve. This will involve research at both the macro and micro level. You can accomplish this objective by conducting a needs assessment and market analysis of your chosen community: determining the size of your population, collecting local and community socio-economic data and characteristics, identifying and conducting focus groups of stakeholders in the community, and identifying potential resources for fundraising and for collaboration. You will also want to make sure that the services that you hope to offer and the needs that you hope to meet are not already satisfied by an existing organization or community group.

Knowing the precise needs of your target community will augment several stages of your planning process. It will help you to identify your exact constituents and stakeholders and the available resources in the community that will help get your nonprofit off the ground. It will also help you to arrive at the mission and purpose of the organization.

Identifying stakeholders will serve as a guide when you pursue volunteer and financial resources, and the data that you have previously collected will help you to sell your mission, emphasizing the need for these services in the community. You will emerge from this stage of the process

more familiar with your community, more focused and better able to market your mission to potential stakeholders and philanthropists in the community.

### **A. Community Demographics** [Return](#)

Basic demographic research will reveal whether the community is large enough to sustain your nonprofit, with the necessary financial and volunteer support and a sufficient constituency base. Depending on what kind of nonprofit services you plan to offer, you will need to locate specific socio-economic data and statistics such as age, race, education, income and poverty level, in order to make sure that the *perceived* need for your nonprofit in that community is also an *actual* need. This information will help fine-tune your purpose as you come to better understand make-up of the community's population. It may also reveal additional needs to consider when determining the services you will offer.

Basic demographic data is available on the Internet at the United States Census Bureau web site (<http://www.census.gov>; <http://quickfacts.census.gov/qfd/index.html>) and at your chosen community's local government web. Additional resources for basic and comparative demographic information include a database of census and demographic data compiled by Mansfield University (<http://lib.mansfield.edu/census.html>) and the United States Census Bureau's County and City Data Book, which is also available on the web (<http://www.census.gov/statab/www/ccdb.html>).

In addition to the basic demographic data necessary to complete your needs assessment, you might choose to look to areas outside of the immediate area in which your nonprofit will be located. For instance, you should determine whether persons might travel from surrounding areas to take advantage of your services, whether it will be worth performing outreach to surrounding areas, and whether or not a facility located in your community brings in outside persons that may benefit from your services. If your nonprofit is the only one of its kind, your organization may consider reaching out to surrounding areas to publicize the availability of the services while increasing your funding base.

### **B. Community Organizations for Competition or Collaboration** [Return](#)

If there is not a group or organization currently fulfilling a need within the community, then the formation of a nonprofit to meet that need is a worthwhile objective. If another organization already fills the needs that you hope to fill, there may not be enough resources or a large enough constituency base to sustain a new nonprofit.

If there is already a similar group currently fulfilling the need in the community, collaboration with that group may be the best way to proceed. The existing nonprofit may want to expand into a new area or they may know of another need in the community not yet met by a nonprofit. Partnering with other organizations will allow you to more effectively meet the needs of the community and the clients while avoiding competition for resources. While the possibility of partnering with another organization that serves the same type of clients could be a viable possibility, you should carefully consider how the missions of both groups fit together and whether the groups are truly compatible.

One way to find groups or nonprofits in the community that may be partners or competitors is through an Internet search. Local government or community web sites often contain lists of local nonprofits which serve the area. The local phone book is also a simple resource for locating the nonprofits currently serving an area's needs. Of course, if you live in a particular area, word of mouth is an option for discovering what needs are already met and which types of needs are unfilled in an area. If you find that community needs are already met or you find an organization for possible collaboration, this may either completely change or further focus the type of nonprofit which you hope to form.

### **C. The Geographic Area**

When choosing a geographic area for a nonprofit organization, you must be sure that the population is large enough to support the mission of the organization. A geographic area may be a neighborhood, city, county or greater metro area. It must contain a sufficient base for both board members to serve in the organization and for a pool of clients who need services.

A geographic area may grow or change with time as the client base grows or concentrates into identifiable areas. A nonprofit organization should be aware of the areas from which its clients are coming and should adjust its location if necessary to better serve its clients. For example, if all of the clients that a nonprofit serves are in the downtown area and the nonprofit is out in the suburbs, then the nonprofit should consider a more convenient location.

### **D. The Stakeholders** [Return](#)

When developing a nonprofit, you should seek out individuals, potential donors, foundations, and other community groups that can work collaboratively with the new organization. These stakeholders are necessary for the development and maintenance of the newly formed organization. They provide a source for labor, funding, and referrals.

In order to identify stakeholders, you should first contact organizations in related fields. You can locate these organizations through internet searches using any web-based search engine and by contacting the local United Way. Organizations in related fields will be a great source of information about community efforts and practices. They may also provide referrals to other organizations, individuals, or foundations that will be useful in the formation of an organization.

Each contact will lead to additional contacts until the entire web of related organizations is unveiled. After you contact all of the related organizations and obtain information about their missions, you can get a feel for which of them will be likely stakeholders in the new organization.

Major employers in the geographic area will also be stakeholders. Some of their employees may use the resources of the nonprofit while some of the management personnel may be board members or contributors. The type of jobs offered by these employers may also provide insight into the economic status of the residents and the benefits that they may be lacking.

### **E. Sources for Board Members and Volunteers** [Return](#)

You should recruit board members from the pool of stakeholders and from prominent members of the community or the geographic area in which the organization will be located. The board members will be legally responsible for the organization and must be willing to give their time to the organization and to abide by its bylaws. They must also be aware of their legal duties of care and loyalty and must be careful to abide by them.<sup>1</sup>

You may also need to recruit volunteers, which you might locate through board members, stakeholders, civic organizations, churches, schools, the business community and other nonprofit organizations. You should be sure to inform volunteers about their legal duty to the organization and about their potential liabilities.<sup>2</sup>

The composition of the Board during the start-up of a nonprofit is often determined by those with personal involvement in the mission of the organization. As the nonprofit begins to examine the task of recruiting and selecting board members, you must first determine who in the community has expertise in the mission of the nonprofit. As the identification of potential board members progresses, however, you should also remember the functions of the board of directors and make sure that those recruited are willing and able to fulfill these functions. The duties, obligations, and liabilities of board members are explained in greater detail in chapters four and five below.

There are as many ways to recruit board members. The following are ideas that you might consider:

1. Form a "One-Meeting Nominating Committee": Draw up a list of twenty well-connected people of the sort you would want on the board who you suspect wouldn't join, but who might know someone who would be a good board member. Call those twenty people and ask them to come to a one-meeting committee over lunch. Tell them that at the lunch they'll be told more about the organization and what it's looking for in board members. At the end of lunch they'll be asked simply for the name of one person they think would be a good board member. The day after the lunch call up each of the nominees and begin by explaining who nominated them.
2. Take out a "Help Wanted–Volunteer Board Member" Ad: Take out a help-wanted ad in the neighborhood newsletter or alumni newsletter of a local college. Example: "HELP SOUTH PARK... We're looking for a few talented and conscientious volunteer board members to help us guide our childcare, teen, and senior programs into the next century. If you can contribute one evening a month and have skills or contacts in accounting, publicity or special event fundraising, call Sister Mary Margaret at xxx-xxxx to find out more about whether this volunteer opportunity is right for you. We're a..."
3. Recruit Your Volunteers: Ask the executive director or the volunteer coordinator if there are two or three hands-on volunteers who would make good board members. Hands-on volunteers, such as support group facilitators, practical life support

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<sup>1</sup> See page 20 of this Manual for explanation of duty of care and duty of loyalty.

<sup>2</sup> See page 65 of this Manual for discussion on volunteer liabilities.

volunteers, meal preparers, weekend tree-planters, classroom aides and others bring both demonstrated commitment AND an intimate knowledge of the organization's strengths and weaknesses. Volunteers, donors and clients should be the first place you look. You don't have to "sell" the agency – they know it already!

4. Look to Other Local Organizations: Pick four local organizations where you don't know anyone, but you'd like to (examples: NAACP, Japanese American Citizens League, Accountants for the Public Interest). Tip: Your local Yahoo site (<http://www.yahoo.com>) is a good place to look for lists under "Community." Ask each officer to call one of the four local organizations and ask to have coffee with the board president or the executive director. Over coffee suggest that your two organizations recommend "retiring" board members to each other as a way of establishing organizational links and strengthening ties among communities.<sup>3</sup>

Often the direction and success of a nonprofit is dependent upon the board of directors. While each nonprofit will provide unique challenges and opportunities to involve talented and committed individuals, the selection of the board is a matter of careful planning, coordination of efforts, personal influence and persuasion skills. Marketing your mission is just as important as you recruit board members as when you fundraise or when you try to "sell" your services to potential constituents.

For a sample needs assessment and market analysis, see Appendix, Chapter 1.

[Appendixchapter1](#)

### **III. The Mission Statement** [Return](#)

The mission statement should be the culmination of your needs assessment and market analysis. It should quickly and concisely explain a nonprofit's mission to the public and to potential board members and volunteers. It should remain a reference point for the board members, staff and volunteers so that they can constantly keep the purpose of the organization in mind.

Many individuals should participate in the creation of a mission statement, including the organization's founders, board members and stakeholders, and you should elicit criticism and feedback so that all aspects and connotations of the statement are considered before it is finalized. The creation of the mission statement may be a long and arduous process that spans a lengthy time period.

The mission statement is a way to not only advertise and market the mission of the organization to the public, but it can also be used as a tool to find financial support. One of the main purposes of the mission statement besides grounding and focusing the organization is to allow the board

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<sup>3</sup> [www.boardcafe.org](http://www.boardcafe.org). BOARD CAFÉ, The Electronic Newsletter Exclusively for Members of Nonprofit Boards of Directors, June 9, 1998. Vol 2, No. 6. Editor: Jan Masaoka (a menu of ideas, information, opinion, news, and resources to help board members give and get the most out of board service). Published by CompassPoint Nonprofit Services, in partnership with the Volunteer Consulting Group.

members and volunteers to quickly convey the purpose of the organization to potential donors or new volunteers.

The mission statement should include both a short one-sentence statement that is easily remembered and memorized and another longer version with more detail. The short statement should be a quick and concise tag line for the organization, while the longer description of the purpose should include more specifics. It should be reviewed and revised during strategic planning sessions as changing conditions cause the organization to move in a new direction or to add new services to its purpose.

Other resources for creating a mission statement:

“How to write a mission statement”

<http://www.tgci.com/magazine/98fall/mission.asp>

“Mission Statement”

<http://www.businessplans.org/Mission.html>

“What should our mission statement say?”

<http://www.nonprofits.org/npofaq/03/21.html>

For sample mission statements, see Mission Statement, Appendix Chapter 1.

[appendixMissionStatement](#)

## CHAPTER 1 APPENDIX [Return](#)

### *NEEDS ASSESSMENT and MARKET ANALYSIS APPLIED*

For our purposes, we have decided that we want to set up a nonprofit which will service the legal needs of cancer patients in Southwest Virginia, tentatively in Roanoke and the surrounding area.

## I. Who, What and Where: An Overview of the Roanoke Population

### A. Demographics<sup>4</sup>

To determine the general make-up of the Roanoke population, we first looked at basic demographic data compiled from various web sites. We wanted to determine the basic population size, income level, and racial make-up of the area, as well as languages spoken. These figures help us to better understand the constituency we will be serving. In order to put this information in perspective as far as determining the relative needs of this population, we compared the Roanoke area to the state overall.

As of the census of [2000](#), there are 94,911 people, 42,003 households, and 24,235 families residing in Roanoke city. The racial makeup of the city is 69.38% [White](#), 26.74% [African American](#), 0.20% [Native American](#), 1.15% [Asian](#), 0.02% [Pacific Islander](#), 0.72% from other races, and 1.78% from two or more races. 1.48% of the population are [Hispanic](#) or [Latino](#) of any race.

Of 42,003 households, 25.5% have children under the age of 18 living with them, 16.5% have a female householder with no husband present, and 12.8% have someone living alone who is 65 years of age or older.

Roanoke's population has 22.6% under the age of 18, 8.2% from 18 to 24, 30.5% from 25 to 44, 22.3% from 45 to 64, and 16.4% who are 65 years of age or older. The median age is 38 years.

The **per capita income for the city is \$18,468. 15.9% of the population and 12.9% of families are below the poverty line.** Out of the total people living in poverty, 24.4% are under the age of 18 and 11.3% are 65 or older.

The [United States Census Bureau](#) includes in Roanoke's metropolitan area the **counties of [Botetourt](#) and [Roanoke](#), and the cities of [Salem](#) and [Roanoke](#).** The metropolitan area's population in the past census was 235, 932.

Roanoke has a very small percentage of non-English speaking residents. While 4.6% speak a language other than English at home, only 1.7% speak English "less than very well." Those that

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<sup>4</sup> See <http://www.nationmaster.com/encyclopedia/Roanoke,-Virginia>;  
<http://roanokeva.usl.myareaguide.com/census.html>; <http://www.pocronk.com/market/swva/3806800.pdf>.



cannot speak English well are split almost evenly between Spanish, Asian-Pacific, and Indo-European. This indicates a low need for translators as we begin to provide services here.

Due to low income levels, many Roanoke residents likely lack health insurance. The Free Clinic of the New River Valley, accessible to residents of Roanoke, serves uninsured residents who meet their income guidelines. Residents are eligible for care if their income falls below \$10, 855 for a single person household.<sup>5</sup> According to the Clinic’s newsletter for Spring 2003, “During the fiscal year 2002, the Clinic set two all-time records by serving 2,993 New River Valley patients.”<sup>6</sup> As noted below, this could account for a lack of preventative care, which leads to the high incidence of cancer in the area.

**POPULATION AND INCOME<sup>7</sup>**

<b>Area</b>	<b>Per Capita Income</b>
Allegheny County	19,635
<a href="#">Botetourt County, VA</a>	13,810
<a href="#">Bedford County, VA</a>	14,305
<a href="#">Craig County, VA</a>	11,186
Franklin County, VA	11,936
Montgomery County, VA	17,077
Roanoke County, VA	24,637
Bedford, VA	15,423
Clifton Forge, VA	15,182
Covington, VA	16,758
Roanoke, VA	18,468
Salem, VA	20,091
Average Per Capita Income	16,542

Total Population for Roanoke and Surrounding Area: 462,126

**PER CAPITA INCOME AS COMPARED TO STATE OVERALL**

Roanoke and Surrounding Area	Virginia
\$16,542	\$32,459

<sup>5</sup> See <http://www.nrvfreeclinic.org/eligibility/index.html>

<sup>6</sup> See [http://www.nrvfreeclinic.org/pdfs/spring\\_newsletter2003.pdf](http://www.nrvfreeclinic.org/pdfs/spring_newsletter2003.pdf)

<sup>7</sup> See at <http://www.poccronk.com/market/swva/3806800.pdf>; <http://quickfacts.census.gov/qfd/states/51000.html>; <http://www.roanokeva.gov/WebMgmt/ywbase61b.nsf/CurrentBaseLink/N25ZEHYC976LBASEN>.

*Average per capita income is significantly below the state per capita income. While the cost of living is slightly lower, the cost of living difference only slightly corrects for this difference in income.*<sup>8</sup>

### THE SPECIFICS

Along with basic socio-economic data and indicators, we needed to determine the incidence of cancer in the Roanoke area to make sure that a sufficient constituency base exists to support a legal services organization set up specifically to address to needs of those suffering from the ramifications of cancer. We located statistical data concerning cancer incidence in Roanoke on-line at the Virginia Health Department web site,

<http://www.vahealth.org/cancerprevention/analysis.pdf>. We found the following:

### CANCER SPECIFIC RISKS<sup>9</sup>

Cancer Site		Incidence/ 100,000 (Rank)	Percent Local Stage Disease (Rank)	Mortality Per 100,000	Risk Factor Prevalence (Rank)	Overall Quartile
Breast	Roanoke	230.6 (35)	69.2 (12)	43.4 (27)	57% (15)	4
	Virginia	127.1	66.8	30.8	55%	
Cervical	Roanoke	51.3 (30)	88.5 (16)	7.9 (35)	55% (33)	4
	Virginia	36.6	88.1	3.3	70%	
Colorectal	Roanoke	102.2 (35)	33.0 (13)	31.6 (31)	37% (9)	4
	Virginia	43.1	31.7	19.4	30%	
Lung	Roanoke	120.2 (35)	N/A	88.5 (31)	37% (2)	3
	Virginia	56.4	N/A	56.0	49%	
Prostate	Roanoke	169.9 (30)	66.7 (28)	38.5 (28)	N/A	4
	Virginia	99.9	76.8	25.3	N/A	

*Incidence of cancer in the Roanoke area is high, likely due to a lack of preventative care which stems from the low income and lack of health insurance.*

*Rank* -Compared to overall health districts in Virginia. Range: 1 (low)- 35 (high)

*Risk Factors*<sup>10</sup> - Breast Cancer: Mammogram in past year

Cervical: Pap smear in prior year

Colorectal: Endoscopies

Lung: Smoking prevalence

*Overall Quartile*- Composite risk based on incidence, present local disease, mortality, and risk factor prevalence. Quartile 1= lowest risk and quartile, 4= highest risk.

<sup>8</sup> See <http://www.roanokeva.gov/WebMgmt/ywbase61b.nsf/CurrentBaseLink/N25ZEJ2M944LBASEN>.

<sup>9</sup> See <http://www.vahealth.org/cancerprevention/analysis.pdf>.

<sup>10</sup> i.e. Lack of preventative screening increases the incidence and severity of cancer in the Roanoke area.

## **SUMMARY OF CANCER INCIDENCE IN ROANOKE**

Demographic Characteristics of Roanoke Health District are fairly similar to that for Virginia overall, with slightly higher elderly and non-white proportions of the population. The overall risk factor for the area is very high, with four of five preventable cancers ranked in the highest risk ranking, quartile 4. Only lung cancer is ranked in the second highest risk ranking, quartiles 3.

Breast cancer in this health district has a 200% higher incidence than for the state overall. The mortality rate is higher than in Virginia overall, but has remained static over time. The early detection rate is still less than 70% and is not improved over time, perhaps due to the lower per capita income than in the state overall translating into less access to health care and preventative measures and less medical resources. The mammography screening rate is low, but is improving.

Cervical cancer is also high risk preventable cancer in the Roanoke Health District and the incidence is high as well as the mortality. Pap screening is low at 15% below the state average. Early detections rates are comparable to the state, but the screening for cervical cancer has gone down.

Colorectal cancer is also high risk. The incidence is more than 200% of that in the state overall, and mortality is significantly higher. Early detection rates are similar to that in the state overall, which is low to begin with, but there has been no improvement in early detection over time.

Lung cancer, with quartile rating 3, has an incidence more than 200% of the state incidence as well. Mortality is also higher and has continued to increase.

Prostate cancer has a higher incidence and mortality rate in the Roanoke Health District than in Virginia overall, the early detection rate is lower, and has decreased over time. Mortality rates are down slightly despite the decrease in early detection.

The high incidence of cancer and low incomes of many Roanoke residents indicates a potential need for a legal services organization for those suffering from cancer. While the population is conducive to such services, the next step is to determine whether such services are already available.

## **WHAT THE DEMOGRAPHICS MEAN**

The Roanoke Health District has a significantly lower per capita income than does Virginia overall, which could account for lack of preventative health care and therefore the much higher incidence, lower rate of early detection, and higher mortality for cancer. Although demographics in Roanoke as far as age and race are similar to the state overall, the difference in income and the perhaps related much higher incidence of cancer and resultant mortality, indicates that the population of Roanoke and surrounding area likely has a great need for low-cost legal assistance for those legal complications arising out of and heightened by cancer.

Given the presence of the Cancer Center of Western Virginia, the need for legal assistance for those complications arising out of this illness will be even greater, and may include a

constituency base that stretches beyond Roanoke into Tennessee and West Virginia. This analysis may depend on whether such services are already available to persons in these locations that suffer from cancer. Conducting a search of the services available in the relevant areas may be necessary if the organization wishes to broaden its constituency to include these persons. In addition, this may broaden fund-raising efforts and influence the geographic area and the make-up of the Board of Directors.

## **B. Potential Competitors or Organizations for Collaboration in Roanoke**

Using the sources mentioned above, we identified several resources that might be potential competitors or organizations for collaboration. We were looking for legal and medical organizations that might partner with our organization, and to make sure that the services that we want to offer are not already being provided in the Roanoke area.

We found that there are not any groups in the Roanoke area currently focused on providing legal services to cancer patients. The legal aid offices will give assistance but they have income requirements that not all cancer patients will meet.

## **AVAILABILITY OF LEGAL SERVICES IN ROANOKE AND SURROUNDING AREA**

The Virginia State Bar offers a lawyer referral line for the general public.<sup>11</sup> The Virginia Lawyer Referral Service can be contacted at 804-775-0808 or at the toll free number of 800-552-7977.<sup>12</sup> The service will take basic information regarding the legal matter and will provide the number of an attorney to the caller who then must contact the attorney for appointment.<sup>13</sup> The charge at the time of the appointment is only \$35 for a half hour appointment.<sup>14</sup>

The Circuit Court Clerk's Office for Roanoke County, Virginia has a website which clearly states that they are not able to provide advice but refers inquiries to the Piedmont Legal Services, Inc./Legal Aid Society of Roanoke Valley.<sup>15</sup> These offices may be contacted at 540-34-2080 or 540-344-2088.<sup>16</sup> This court handles real estate, marriages and divorces and probate and estate matters.<sup>17</sup>

The Legal Aid Offices available to residents of the Roanoke area can be found at Blue Ridge Legal Services, Inc. which takes applications for aid for the Legal Aid Society of Roanoke Valley. These offices provide services for bankruptcy, divorces and wills for the elderly and the terminally ill but they do not specifically target or offer services for cancer patients.<sup>18</sup> The availability for services depends on the income level of the individuals which must be less than

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<sup>11</sup> See The Virginia State Bar Association, Virginia Legal Referral Services, <http://www.vsb.org/vlrs.html>

<sup>12</sup> Id.

<sup>13</sup> Id.

<sup>14</sup> Id.

<sup>15</sup> <http://www.roanokecountyva.gov/Departments/CircuitCourtClerksOffice/Default.htm>

<sup>16</sup> Id.

<sup>17</sup> Id.

<sup>18</sup> Telephone conversation with Nancy, Blue Ridge Legal Services (Spring 2005) and a Telephone conversation with Charity, Blue Ridge Legal Services (April 7, 2005).

\$15,613 for a household of two people.<sup>19</sup> If applicants for legal services do not meet this eligibility requirement, services will not be free, but they might still receive services for a reduced fee.<sup>20</sup>

## **MEDICAL ORGANIZATIONS IN THE ROANOKE AREA**

For our purposes, it will also be helpful to contact medical organizations and agencies in the Roanoke area that might provide information and referrals. Such organizations include: Roanoke City Department of Social Services, Roanoke County Department of Social Services, the Roanoke office of the American Cancer Society, Carilion Cancer Center of Western Virginia, Bedford Memorial, Gill Memorial EENT Hospital, CentraHealth LGH/VBH, Columbia Lewis-Gale Medical Center, and HCA Hospitals of Southwest Virginia.

All of the above organizations deal with cancer patients on a day-to-day basis and will be excellent sources for referrals. They will also be able to provide us with their current procedures for dealing with patients that have financial or legal needs so that we would be better able to tailor the organization to the needs of those patients. Also see Chapter 4's section "Sources for Board Members" for listings of hospices and an oncology practice.

When contacting organizations in the medical field it will be helpful if we emphasize that this organization will not be providing any medical malpractice services. This information should create a greater degree of openness and receptiveness, because it lets the medical professionals know that our organization is intended solely for the benefit of cancer patients and will not pursue endeavors that would be to the detriment of partners in the area.

### **C. Identify the Geographic Area**

The geographic area of greater Roanoke was chosen in this example because of the needs assessment which indicated that this area may benefit from this type of nonprofit organization. The greater area was chosen instead of just the city of Roanoke because we wanted to encompass more people and serve the same area as the hospitals.

Roanoke is home to the Carilion Cancer Center of Western Virginia, a facility which conducts out-patient treatments for persons all over western Virginia and the surrounding area. This facility offers both medical oncology and radiation oncology services. For the purposes of an organization that will provide legal services to cancer patients, the location of this center in Roanoke is key, increasing the potential need for the service and increasing the number of potential constituents. It may also change the geographical area which we will serve and that we will need to later research. Notably, the center also conducts clinical trials for cancer patients, conducting national clinical drug trials and offering advanced and sometimes experimental treatment options.<sup>21</sup> This means that patients often come from not only Virginia, but also from

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<sup>19</sup> Telephone conversation with Charity, Blue Ridge Legal Services (April 7, 2005).

<http://www.brls.org/RTF1.cfm?pagename=Services>.

<sup>20</sup> Id.

<sup>21</sup> <http://www.carilion.com/cancer/>

Tennessee and West Virginia, to receive treatment. Over three-hundred people have taken advantage of these clinical trials since the beginning of this program.<sup>22</sup>

#### **D. Identify Stakeholders**

When forming a legal support organization for cancer patients, stakeholders include cancer patients, lawyers, the legal community at large, hospitals, doctors, medical social workers, and potential donors. Donors can also be found by contacting local medical and legal foundations, as well as local charitable giving consortiums, including the United Way and community foundations.

In the Roanoke area, specifically, The Foundation for Roanoke Valley<sup>23</sup> helps individuals and families to establish charitable funds and awards grants to local organizations. The Foundation looks for innovative but practical approaches for solving community problems, a well planned approach to important community issues, an efficient use of community resources, the involvement of underserved constituencies and the coordination and involvement of other organizations in the area. This would be a good place for start-up funding because they do not usually give to established organizations, but rather to people with new ideas to fulfill a need in the community.

In the legal community, we should also contact the Roanoke Bar Association Foundation<sup>24</sup> for fundraising support and as a source for potential volunteers. Large local firms such as Woods Rogers<sup>25</sup> are also good contacts, as they may be able to provide pro-bono attorneys, as well as information about general practices in the area, such as who they refer clients that they do not take on as a result of income restrictions.

One thing to consider as we locate potential legal stakeholders in the community is whether there is a sufficient volunteer base, or enough attorneys to fill the needs of another nonprofit legal services organization. If there are not enough attorneys to fill volunteer needs, this may mean that our nonprofit needs more staff attorneys, a consideration which will require much different funding needs in order to provide salaries and a permanent office.

Finally, we should contact local courts to determine if there are any free clinics in the area, and if they exist, what organizations are sponsoring them. These local clinics could serve as a source for referrals or as a potential alternative for clients that the new organization is unable to help, and their sponsors may also be a source of funding for the new organization.

Major employers in the area are also stakeholders for our organization. Their employees will use our services, and they may be a source of corporate funding and donations. Examples of the major employers for Roanoke County are listed below. They may be a good resource for potential board members, fundraising or other resources.

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<sup>22</sup> Id.

<sup>23</sup> <http://www.foundationforroanokevalley.org>

<sup>24</sup> <http://www.roanokebar.com/foundation.html>

<sup>25</sup> 10 South Jefferson Street, Suite 1400, Roanoke, VA 24011; Phone: 540.983.7600

**Major Manufacturing Employers in Roanoke County<sup>26</sup>:**

1. John W. Hancock, Jr., Inc.  
300-599 employees  
Fabricated Metal Industry

2. Medeco Security Locks, Inc.  
300-599 employees  
Hardware Industry

**Major Non-Manufacturing Employers in Roanoke County<sup>27</sup>:**

1. Allstate Insurance Co., Inc.  
1000-1499 employees  
Insurance services

2. Wachovia  
1000-2499 employees  
Banking Industry

Medical organizations and agencies in the Roanoke area, useful as sources for patient referrals as well as providing information on general practices and customs in the Roanoke area, include the following:

1. Roanoke City Department of Social Services  
1510 Williamson Road NE  
Roanoke, VA 24012  
Phone: (540) 853-2591  
Fax: (540) 853-2027

Contact: Jane R. Conlin, Director

2. Roanoke County Department of Social Services  
220 East Main Street  
P. O. Box 1127  
Salem, VA 24153-1127  
Phone: (540) 387-6087  
Fax: (540) 387-6210

Contact: Betty McCrary, Director

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<sup>26</sup> This information was found under the Community Profiles section at: [www.yesvirginia.org](http://www.yesvirginia.org), the website for the Virginia Economic Development Partnership, a state authority

<sup>27</sup> Id.

3. Roanoke office of the American Cancer Society  
9 E Church Ave  
Roanoke, VA 24011  
Phone: (540) 344-8699  
Fax: (540) 345-2361

4. Carilion Cancer Center of Western Virginia  
2013 S. Jefferson St.  
Roanoke, VA 24014  
Phone: (540) 266-6000  
Toll Free: (800) 422-8482

5. Bedford Memorial  
1613 Oakwood St.  
P.O. Box 688  
Bedford, VA 24523  
Phone: 540-586-2441

6. Gill Memorial EENT Hospital  
707 S Jefferson St  
Roanoke, VA 24016  
Phone: (540) 344-2071

7. CentraHealth LGH/VBH  
1920 Atherholt Road  
Lynchburg, VA 24501-1104  
Phone: (434) 947-3000

8. Columbia Lewis-Gale Medical Center  
1900 Electric Road  
Salem, VA 24153-7494  
Phone: (800) 543-5660  
Fax: (540) 776-4736  
Website: <http://www.lewis-gale.com/>

9. HCA Hospitals of Southwest Virginia  
1900 Electric Road  
Salem, VA 24153  
Phone: (540) 772-2890  
Website: <http://electahealth.com>

Contacts at the Carilion Cancer Center and the local hospitals can provide patient referrals from doctors and nurses that identify patients with needs. Additionally, they will be able to provide us with their current procedures for dealing with patients that have financial or legal needs so that we would be better able to tailor the organization to the needs of those patients. A close



relationship with doctors in the area will provide our organization with the information that will be necessary to assist clients that are receiving treatment locally.

Contacting the HCA Hospitals organization will provide information about the operations of all five of their hospitals in western Virginia. This data will include names and contact information for individuals that can assist our organization.

When contacting organizations in the medical field we should indicate that this organization will not provide any medical malpractice services. This information will create a greater degree of openness and receptiveness, because it lets the medical community know that our organization is intended solely for the benefit of cancer patients and will not pursue endeavors that might be detrimental to medical professionals.

The Roanoke City and County Departments of Social Services will be invaluable for client referrals as a result of their daily interactions with needy individuals suffering the financial burdens resulting from cancer treatment. The Roanoke office of the American Cancer Society is also a resource both for client referrals and for fund raising opportunities. Through the American Cancer Society, our organization might receive information about community fund raising events as well as a list of potential donors.

### **E. Sources for Board Members and Volunteers**

Here are some examples of actual business and organizations in Roanoke which may be good sources for board members and volunteers:

#### **Cancer Practice in Roanoke, VA:**

1. Blue Ridge Cancer Care:

Their website has contact information for several oncology/hematology and radiation oncology offices in Roanoke and surrounding areas:

<http://www.visionefx.net/Blue%20Ridge/contact.htm#roanoke1>

#### **Hospices located in Roanoke, VA<sup>28</sup>:**

1. Good Samaritan Hospice

3825-A Electric Road

Roanoke, VA 24018

Phone: 540-776-0198

Toll Free: 888-466-0198

Fax: 540-776-0841

E-mail: [info@goodsamhospice.org](mailto:info@goodsamhospice.org)

Website: <http://www.goodsamhospice.org/index.htm>

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<sup>28</sup> The three hospices were found using a search of the database on the website of the National Hospice and Palliative Care Organization at: <http://www.nhpco.org/custom/directory/>

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Contacts: Ms. Suzanne Moore, MSN or Ms. Laura Garnett

2. Gentle Shepherd Hospice, Inc.  
4005 Electric Rd. SW  
Roanoke, VA 24014  
Phone: 540-989-6265  
Toll Free: 800-789-0586

Contacts: Mr. Don Eckenroth or Ms. Tracie McKenney

3. Carilion Hospice Services-Roanoke  
1917 Franklin Rd. SW, Suite B  
Roanoke, VA  
Phone: 540-224-4753  
Toll Free: 800-964-9300

Contacts: Ms. Linda Mercer Royal, RN, BS or Ms. Alyson Lawson, RN, BSN

### **Bar Associations located in and serving Roanoke:**

1. Roanoke Bar Association  
P. O. Box 18183  
Roanoke, VA 24014  
Phone: (540) 342-4905  
Fax: (540) 342-1252  
Email: [roanokebar@earthlink.net](mailto:roanokebar@earthlink.net)  
President: Elizabeth K. Dillon  
President-Elect: Steven L. Higgs  
Executive Director: Cathy Caddy

2. Virginia State Bar  
707 E. Main Street, Suite 1500  
Richmond, Virginia 23219-2800  
Phone: (804) 775-0500  
Website: [www.vsb.org](http://www.vsb.org)

3. Virginia Bar Association  
701 E. Franklin St., Ste. 1120  
Richmond, VA 23219  
Phone: (804) 644-0041  
Website: [www.vba.org](http://www.vba.org)

**Major Law Firms in Roanoke<sup>29</sup>:**

1. Brumberg, Mackey and Wall, P.L.C.  
300 Professional Arts Bldg., 30 West Franklin Rd.  
P.O. Box 2470  
Roanoke, VA 24011  
Phone: 540-343-2956  
Web site: [www.bmwlaw.com](http://www.bmwlaw.com)  
There are six lawyers in this firm.

2. Glenn, Feldman, Darby & Goodlatte, P.C.  
210 1st Street S.W., Suite 200  
P.O. Box 2887  
Roanoke, VA 24001  
Phone: 540-224-8000  
Web site: [www. Gfdg.com](http://www.Gfdg.com)  
There are 11 lawyers in this firm

3. Gentry, Locke, Rakes & Moore  
Sun Trust Plaza  
10 Franklin Rd., S. E.  
Suite 800  
P.O. Box 40013  
Roanoke, VA 24022  
Phone: 540-983-9300  
Web site: [www.gentrylocke.com](http://www.gentrylocke.com)  
There are 51 lawyers in this firm.

**Churches in Roanoke<sup>30</sup>:**

1. There are six Lutheran churches with one as an example:  
Christ Lutheran Church  
2011 Brandon Ave. SW  
Roanoke, VA 24015  
Phone: (540) 982-8334

2. There are over 60 Baptist churches with one as an example:  
Blue Ridge Baptist Church  
974 Colonial Rd  
Blue Ridge, VA 24064  
Phone: (540) 977-2041

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<sup>29</sup> The firms were found using the search function at [www.martindale.com](http://www.martindale.com), a nationwide directory of lawyers and law firms.

<sup>30</sup> The churches were found using the search feature at: [www.usachurch.com](http://www.usachurch.com)

3. There are 21 Methodist churches with one as an example:

Grace United Methodist Church

4404 Williamson Rd., NW

Roanoke, VA 24012

Phone: (540) 366-0790

## **II. Mission Statement for Our Roanoke Nonprofit**

Based on the high incidence of cancer in the Roanoke Area, the low overall income of the area, and the current lack of legal services for the needs arising out of cancer, we devised the following purpose and mission:

### **Short Mission Statement:**

A nonprofit organization dedicated to providing cancer patients and their families in the greater Roanoke area with referrals for legal services and legal advice.

### **Detailed Mission Statement:**

The purpose of this organization will be to address the legal needs of cancer patients that arise out of, or are heightened by their illness and treatment. These needs may include filing for Medicare, securing Social Security and disability benefits, debt management, creation of wills, estate planning, employment disputes, and arranging for care and custody of children. We will provide these services through private attorneys either working pro-bono or on a sliding scale. The organization seeks to work hand in hand with other community organizations, such as medical and legal organizations, to serve the needs of cancer patients.