

YVCF
NONPROFIT
EDUCATION
SERIES

Nonprofit Board Fundamentals

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Agenda

- Who's here today
- The four primary board responsibilities
- The idea of a board
- Discussion: questions and areas for focus
- How we think about fundraising
- Discussion
- Takeaways:
 - Recommended policies and procedures
 - What every board member should do
- Additional resources

A Board's Four Primary Responsibilities



Legal - Accountability and public trust to protect the assets of the organization, guard against self-dealing, and observe ethical requirements.



Fiscal - Assist with the financial health and security of the organization and ensure a public accounting of assets, income, operations and expenditures.



Governance - Set the direction for the organization and operate within the bylaws.



Policy - Provide leadership by setting policy and ensuring its implementation by staff.

The Idea of a Governing Board

REPRESENT

- Who are your constituents?
- Who are you?

Show Up



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STEWARD

- \$
- Other assets=?
- Mission/Values
- Role of steward/
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Do the Work



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PLAN

- Vision
- Course corrections
- S.M.A.R.T. goals

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Chart a Course



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GOVERN

- Policies
- Best practices

Help Navigate



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MANAGE

- Your leader
- Working boards: who leads?

Support your Leaders



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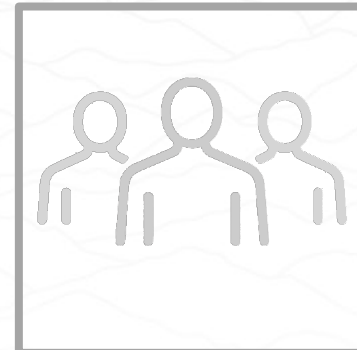
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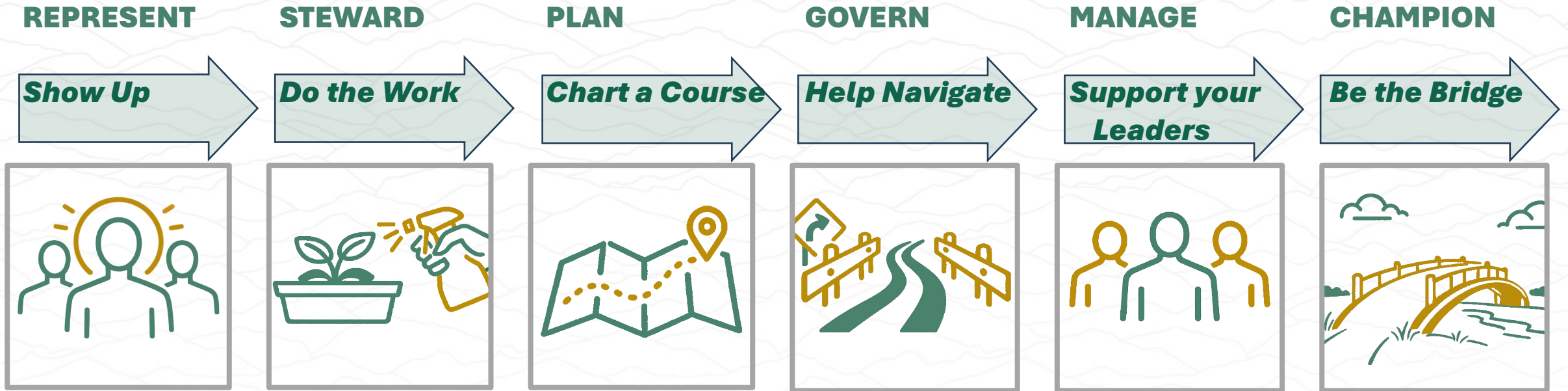
CHAMPION

- Spread the word
- Secure resources
- Eliminate barriers

Be the Bridge

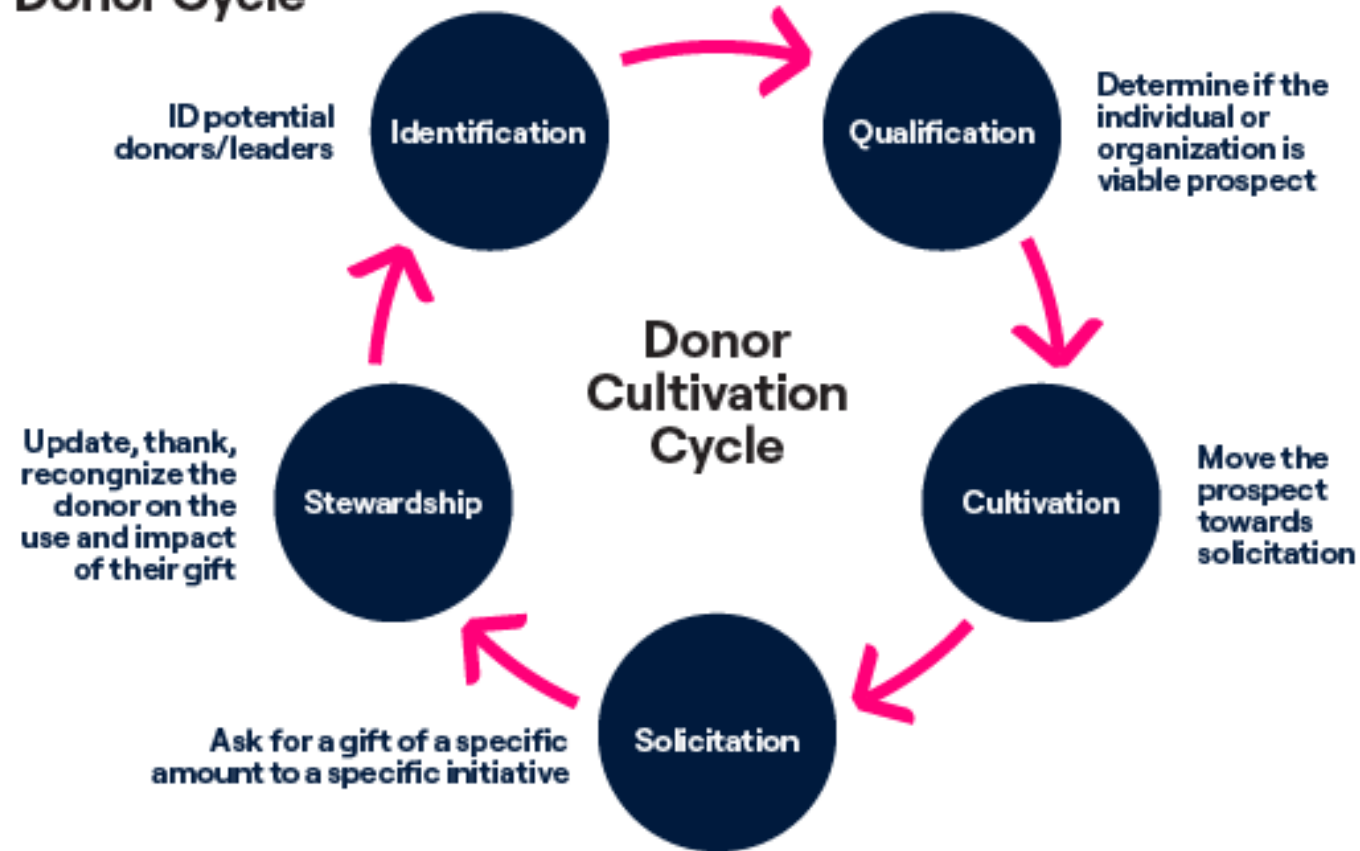


The Idea of a Governing Board



How we think about fundraising

Donor Cycle



Recommended Policies and Procedures

1. Public Documents:
 - IRS letter of determination: [how to get a copy](#)
 - 990 Tax return & related forms (Sched. B should **not** be public!): [resources](#)
 - Candid transparency badge (optional but recommended): [learn more](#)
2. Board Handbook/Manual: [What goes into one?](#)
3. New Director Onboarding: [Pointers and sample content](#)
4. Nominating Process: [7 ideas to build one](#)
5. Policies & Governance Documents: [List of recommended +resources to create/update](#)
 - Board size: [what's the right number?](#)
6. Insurance: [What is D&O insurance? \(and why you need it\)](#)

What Every Board Member Should Do

1. REPRESENT: Know and commit to the **mission and purpose**.
2. REPRESENT: Attend and participate fully in board and committee **meetings**.
3. REPRESENT: Bring a thoughtful **perspective** to the policies, plans, and goals of the organization.
4. REPRESENT: Be a strong **advocate** of the organization in word and action.
5. STEWARD: Make an annual **financial contribution** at a level significant for each board member.

What Every Board Member Should Do

6. PLAN: Participate in strategic **planning**; set long-range vision for the organization.
7. GOVERN: Provide **financial oversight**, approve budget, and review audit.
8. MANAGE: Help select, support, and evaluate the **executive director**.
No Staff? Consider and tend to your leadership, whoever that is.
9. MANAGE: Monitor and strengthen **programs and services**.
10. CHAMPION: Through civic, professional, and personal associations, assist in **strengthening the capacity** of the organization to fulfill its mission:
 - **Build and maintain** a competent board
 - Forge and maintain **relationships** with peers and stakeholders
 - Plan for **emergencies and succession**

Additional Resources

These publications and resources informed and inspired this presentation.

1. Colorado Secretary of State: [Nonprofit Board Member Course](#): est. 2-3 hours to complete all modules
2. Craig-Scheckman Family Foundation's [Board Leadership Initiative](#) (events and resources 2021-present); email to receive updates: mark@csff.org
3. Colorado Nonprofit Association (2018): [Principles & Practices for Nonprofit Excellence in Colorado, Fourth Edition](#): 64 pages, for board and staff
4. Hopkins, B.R. (2019): [Legal Responsibilities of Nonprofit Boards, Third Edition](#). BoardSource 💰
5. Ingram, R.T. (2015): [Ten Basic Responsibilities of Nonprofit Boards, Third Edition](#). BoardSource 💰



All resources are free to access/download unless marked: 💰

Additional Resources

*YVCF offers other trainings plus many services for your organization.
Visit [YVCF.org](https://www.yvcf.org), explore the NONPROFITS menu:*

The image shows a screenshot of the YVCF website. At the top, there is a navigation bar with social media icons (Facebook, Instagram, YouTube, Email) on the left, and menu items: SCHOLARSHIPS, PORTAL, and DONATE. Below this, the YVCF logo is on the left, and the text reads: "NEXT TRAINING: **COMMUNITY GRANT APPLICANT TRAININGS** Apr. 28 (Craig) May 5 (Steamboat)". Below that, it says "2026 TRAININGS TO COME" followed by a list: "• Finance Fundamentals • Marketing • Donor Stewardship ... and more!". On the right, the "NONPROFITS" menu is open, showing options: FUNDING OPPORTUNITIES, GIVING CIRCLE FUNDING, NONPROFIT EDUCATION, SERVICES AND RESOURCES, YAMPA VALLEY GIVES, NONPROFIT DIRECTORY, and CONFERENCE ROOM RESERVATION. A mouse cursor is pointing at the "GIVING" link. The background of the website features a scenic view of mountains and a forest. At the bottom right, the YVCF logo and name are repeated.

THANK YOU!



YAMPA VALLEY

COMMUNITY FOUNDATION

CONNECTING PEOPLE WHO CARE WITH CAUSES THAT MATTER