YVCF
NONPROFIT
EDUCATION
SERIES

Nonprofit Board Fundamentals

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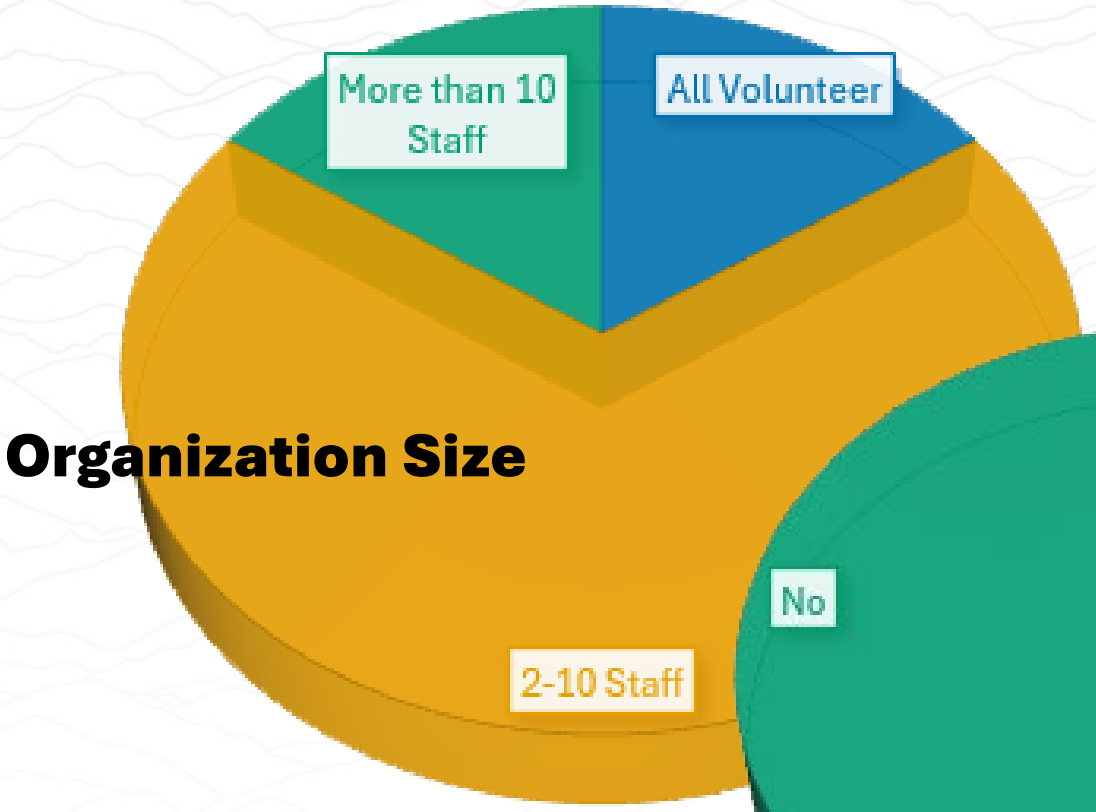
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Agenda

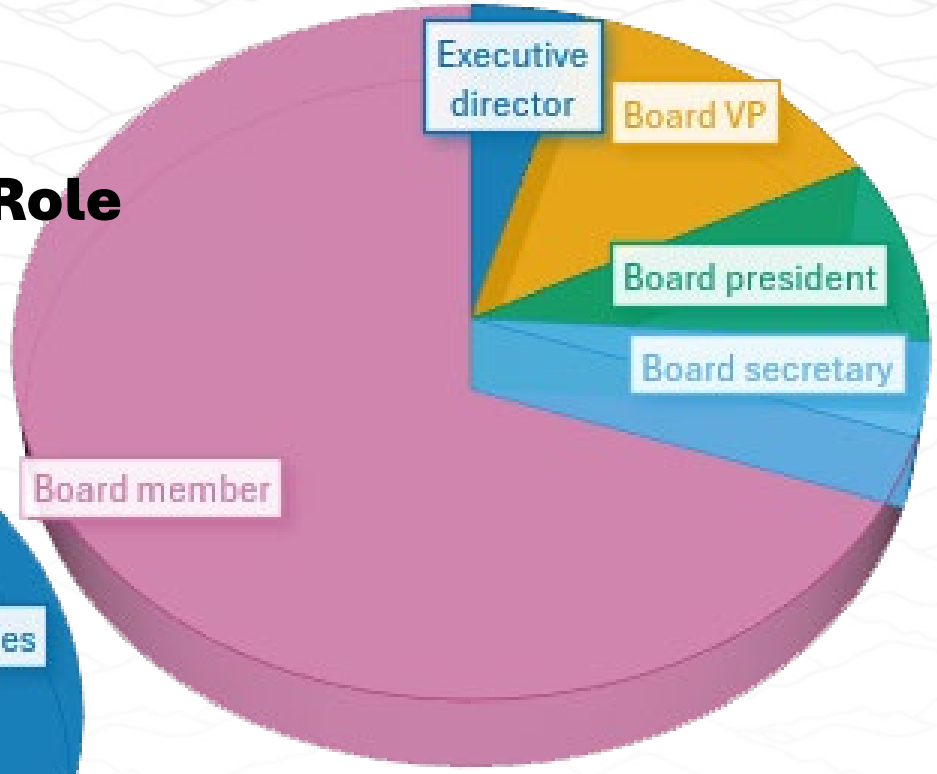
- Who's here today
- The four primary board responsibilities
- The idea of a board
- Discussion: questions and areas for focus
- How we think about fundraising
- Discussion
- Takeaways:
  - Recommended policies and procedures
  - What every board member should do
- Additional resources

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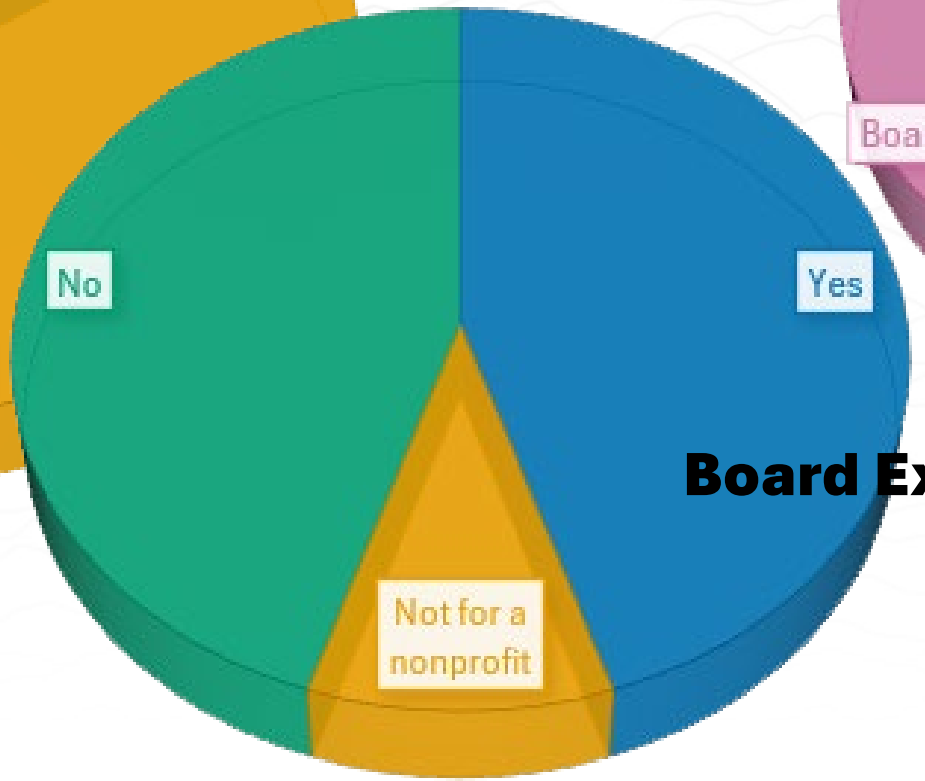
Who's Here Today



Organization Size



Role



Board Experience

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Your Questions/Goals



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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.

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The Idea of a Governing Board

REPRESENT

- Who are your constituents?
- Who are you?

Show Up



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The Idea of a Governing Board

REPRESENT

- Who are your constituents?
- Who are you?

STEWARD

- $
- Other assets=?
- Mission/Values
- Role of steward/ fiduciary

Show Up



Do the Work



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The Idea of a Governing Board

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

Show Up ***Do the Work*** ***Chart a Course***







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The Idea of a Governing Board

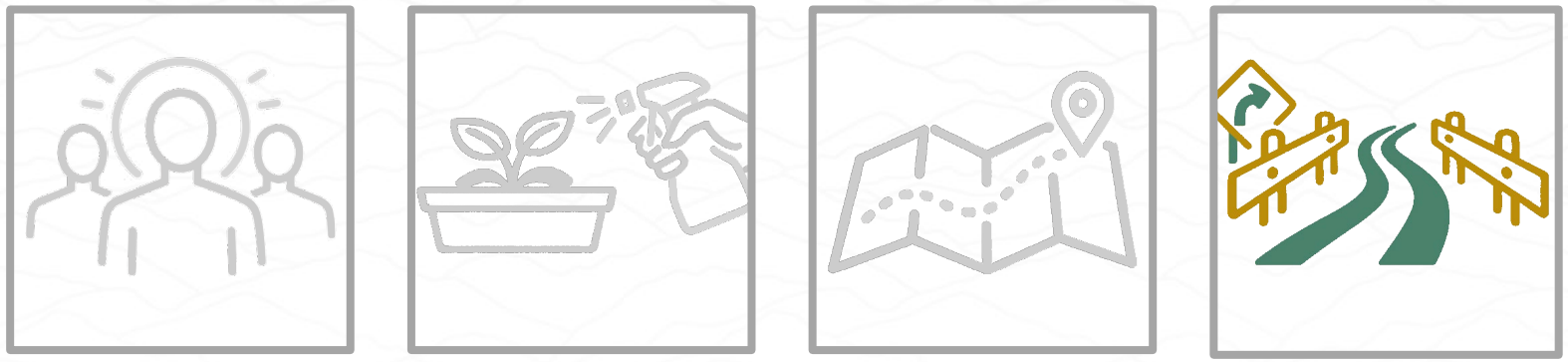
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GOVERN
- Policies
- Best practices

Show Up ***Do the Work*** ***Chart a Course*** ***Help Navigate***



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The Idea of a Governing Board

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GOVERN
- Policies
- Best practices

MANAGE
- Your leader
- Working boards: who leads?

Show Up



Do the Work



Chart a Course



Help Navigate



Support your Leaders



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The idea of a governing board

REPRESENT
- Who are your constituents?
- Who are you?

STEWARD
- $
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- Mission/Values
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PLAN
- Vision
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- S.M.A.R.T. goals

GOVERN
- Policies
- Best practices

MANAGE
- Your leader
- Working boards: who leads?

CHAMPION
- Spread the word
- Secure resources
- Eliminate barriers

Show Up



Do the Work



Chart a Course



Help Navigate



Support your Leaders



Be the Bridge



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The Idea of a Governing Board

REPRESENT — *Show Up*



STEWARD — *Do the Work*



PLAN — *Chart a Course*



GOVERN — *Help Navigate*



MANAGE — *Support your Leaders*

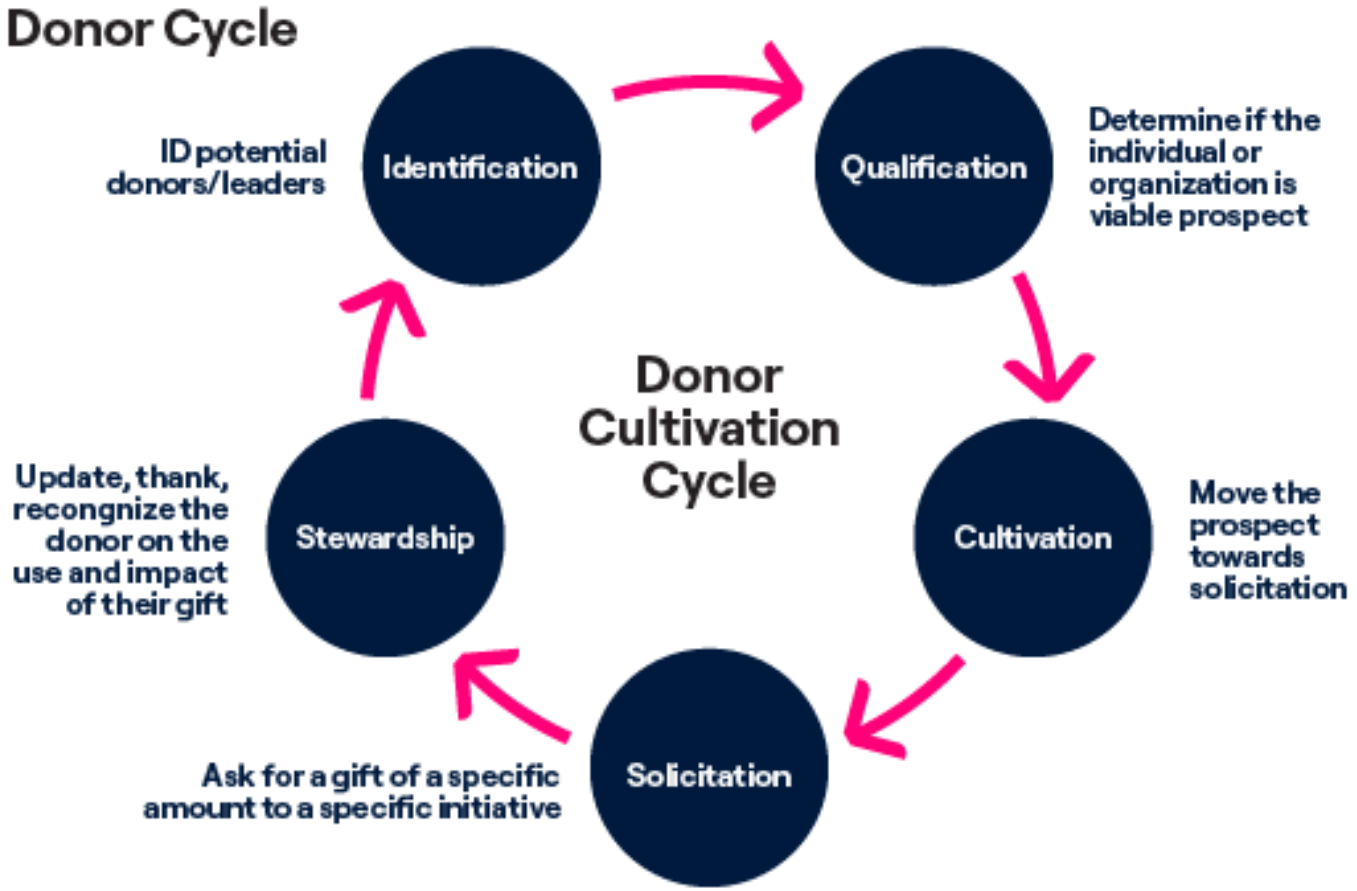


CHAMPION — *Be the Bridge*



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How we think about fundraising



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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)

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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**

Questions?

What is one thing you will do with today's info?

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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. Colorado Nonprofit Association (2018): *Principles & Practices for Nonprofit Excellence in Colorado, Fourth Edition*: 64 pages, for board and staff
3. Hopkins, B.R. (2019): *Legal Responsibilities of Nonprofit Boards, Third Edition*. BoardSource $
4. Ingram, R.T. (2015): *Ten Basic Responsibilities of Nonprofit Boards, Third Edition*. BoardSource $
5. Craig-Scheckman Family Foundation's *Board Leadership Initiative* (events and resources 2021-2025)


COLORADO SECRETARY OF STATE

Completion Certificate

THIS DOCUMENT CERTIFIES THAT

Greg Hamilton
has successfully completed the
Nonprofit Board Member Course

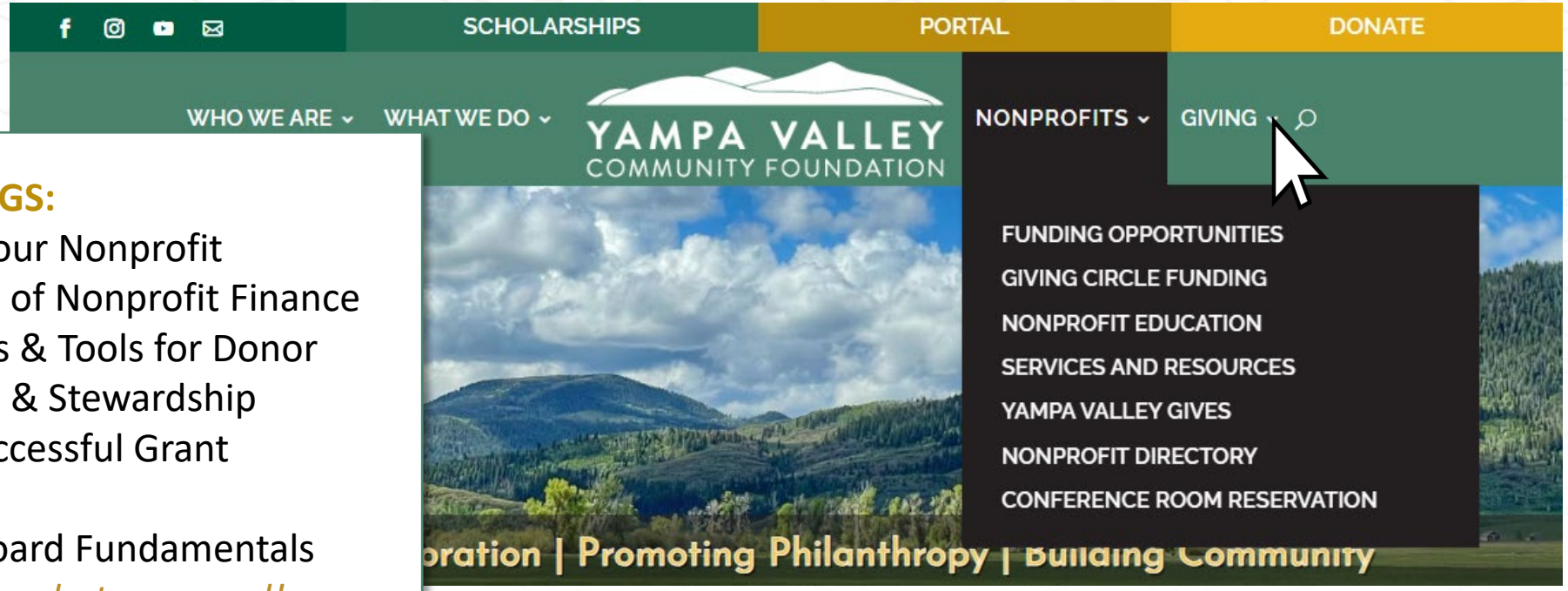
Completed on:
3/18/2026

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

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Additional Resources

YVCF offers other trainings plus many services for your organization.
Visit YVCF.org, explore the NONPROFITS menu:



YVCF NONPROFIT EDUCATION SERIES

2027 TRAININGS:

- Marketing Your Nonprofit
- Nuts & Bolts of Nonprofit Finance
- Practical Tips & Tools for Donor Engagement & Stewardship
- Keys to a Successful Grant Application
- Nonprofit Board Fundamentals
- *+ let us know what you need!*

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Thank you!

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CONNECTING PEOPLE WHO CARE WITH CAUSES THAT MATTER