



## TOOL KIT #2

# BOARD FINANCIAL GOVERNANCE

### Resource List

This Resource List for Tool Kit #2 includes great web-based and PDF handouts on each of the three topic areas (Board Financial Statements, the Form 990, and Fundraising) that comprise this Tool Kit.

The Resource List includes resources that you can use selectively to meet the professional development time available and the specific needs of your own Parent Centers. Here are several ways to use the Resource List:

- Identify resources to use during the Dialogue Guide discussion.
- Provide hard copies of 1 or 2 resources from the Resource List that really speak to you for your Parent Center.
- Provide a copy of this whole Resource List as a “take home” for later study by Board members.

All PDF handouts on the Resource List will be made available in a central repository for Boards and Directors to access. Permission to reprint has been obtained for all copyrighted documents.

Topic Area	Resource	Description	File Name Or Web Link	Source
<b>FINANCIAL STATEMENTS</b>	The invisible yellow line in financial operations	This resource focuses on board and staff roles, financial oversight, budgeting and fiscal controls.	<a href="https://regioncptac.org/wp-content/uploads/2023/01/TK2_1_2013-Jean-Block-invisible-yellow-line-financial-management.pdf">https://regioncptac.org/wp-content/uploads/2023/01/TK2_1_2013-Jean-Block-invisible-yellow-line-financial-management.pdf</a>	
	Managing cash flow	A brief resource that offers an overview of the why, when, and, how to track agency cash flows.	<a href="https://regioncptac.org/wp-content/uploads/2023/01/TK2_2_2016-Managing-Cash-Flow.pdf">https://regioncptac.org/wp-content/uploads/2023/01/TK2_2_2016-Managing-Cash-Flow.pdf</a>	Nonprofit Assistance Fund
	Nonprofit financial management self-assessment tool	Useful assessment tool, covering a range of financial issues for nonprofits	<a href="https://regioncptac.org/wp-content/uploads/2023/01/TK2_3_2016-NONPROFIT-Fin-Mgmt-Self-Assessment-1.pdf">https://regioncptac.org/wp-content/uploads/2023/01/TK2_3_2016-NONPROFIT-Fin-Mgmt-Self-Assessment-1.pdf</a>	Nonprofit Association of Oregon
	Using balance sheets	Brief resource on reading and using a balance sheet	<a href="https://regioncptac.org/wp-content/uploads/2023/01/TK2_4_Balance-Sheet-Cheat-Sheet.pdf">https://regioncptac.org/wp-content/uploads/2023/01/TK2_4_Balance-Sheet-Cheat-Sheet.pdf</a>	Nonprofit Assistance Fund
	What are the key financial questions our board should ask?	Ten questions board members of nonprofits should considering when discussing financial information	<a href="https://regioncptac.org/wp-content/uploads/2023/01/TK2_5_Key-Financial-Questions-a-Board-should-ask.pdf">https://regioncptac.org/wp-content/uploads/2023/01/TK2_5_Key-Financial-Questions-a-Board-should-ask.pdf</a>	Boardsource
	Understanding financial statements	A basic guide to the different aspects of a nonprofit financial statement	<a href="https://regioncptac.org/wp-content/uploads/2023/01/TK2_6_UnderstandingFinancialStatements-print.09.pdf">https://regioncptac.org/wp-content/uploads/2023/01/TK2_6_UnderstandingFinancialStatements-print.09.pdf</a>	MacEwan – Alberta
	What board members need to know about not-for-profit finance and accounting	A booklet that is designed to orient incoming board members on their financial responsibilities	<a href="https://regioncptac.org/wp-content/uploads/2023/01/TK2_7_What-Board-Members-Need-to-Know-about-NP-Finance-and-Accounting.pdf">https://regioncptac.org/wp-content/uploads/2023/01/TK2_7_What-Board-Members-Need-to-Know-about-NP-Finance-and-Accounting.pdf</a>	Jacobsen Jarvis

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<b>THE FORM 990</b>	The Board's role in reviewing a 990	A succinct checklist targeting board member and their role in governance related to the 990	<a href="https://regioncptac.org/wp-content/uploads/2023/01/TK2_8_990-Checklist.pdf">https://regioncptac.org/wp-content/uploads/2023/01/TK2_8_990-Checklist.pdf</a>	Boardsource
<b>FUNDRAISING</b>	Fifty-Three ways for board members to raise \$1,000	A description of ways for board members to raise funds, with suggested contracts with agency staff.	<a href="https://regioncptac.org/wp-content/uploads/2023/01/TK2_9_53-ways-to-raise-one-thousand-dollars_0.pdf">https://regioncptac.org/wp-content/uploads/2023/01/TK2_9_53-ways-to-raise-one-thousand-dollars_0.pdf</a>	Grassroots Fundraising Journal
	Idealware's guide to low cost donor management systems	Idealware & NTEN provide an extensive look at donor management systems available to nonprofits (2017).	<a href="https://regioncptac.org/wp-content/uploads/2023/01/TK2_10_ConsumersGuidetoLowCostDonorMgtSystems_0.pdf">https://regioncptac.org/wp-content/uploads/2023/01/TK2_10_ConsumersGuidetoLowCostDonorMgtSystems_0.pdf</a>	Idealware
	Assessing organizational readiness for fundraising	An overview of needed organizational factors and assessment tools for preparing nonprofit fundraising efforts	<a href="https://regioncptac.org/wp-content/uploads/2023/01/TK2_11_Donor_Fundraising-Tool-Kit1-1.pdf">https://regioncptac.org/wp-content/uploads/2023/01/TK2_11_Donor_Fundraising-Tool-Kit1-1.pdf</a>	Power Prism
	Finding your inner fundraiser: A self-assessment tool	A tool that will help potential fundraising teams to identify current skills and experiences in philanthropy	<a href="https://regioncptac.org/wp-content/uploads/2023/01/TK2_12_Finding-your-inner-fundraiser_self-assessment.pdf">https://regioncptac.org/wp-content/uploads/2023/01/TK2_12_Finding-your-inner-fundraiser_self-assessment.pdf</a>	Grassroots Fundraising Journal
	Fundraising policy template	A sample policy regarding philanthropic fundraising	<a href="https://regioncptac.org/document/fundraising-policy-template/">https://regioncptac.org/document/fundraising-policy-template/</a>	Region 6 PTAC

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