

BOARD BUDGET PRESENTATION

7-POINT CHECKLIST FOR NONPROFIT LEADERS

Use this before your board meeting to turn budget numbers into clear decisions.

- ☐ **1 SURPLUS OR DEFICIT**
Show the planned result. If a deficit is proposed, explain its purpose, funding source, and cash impact.
- ☐ **2 WHAT CHANGED—AND WHY**
Compare the proposed budget with last year's budget and current forecast. Explain major changes.
- ☐ **3 FUNDING SOURCES & CONFIDENCE**
Identify major donors, grants, renewals, and pending awards. Flag concentrations and uncertain gifts.
- ☐ **4 STAFFING & PROGRAM PRIORITIES**
Explain new or eliminated positions, compensation changes, program shifts, and funding dependencies.
- ☐ **5 OPERATING RESERVES & CASH**
Show beginning and projected ending available reserves; explain liquidity and planned reserve use.
- ☐ **6 RISKS, ASSUMPTIONS & PLAN B**
Name the top 2–3 risks, their potential impact, and the response if funding or costs change.
- ☐ **7 WHAT YOU NEED FROM THE BOARD**
State the approval requested, decisions needed, and where board relationships can help.

Before you present, ask:

Can the board explain what is changing, what could go wrong, and which decisions or support you need from them?

Need help making your budget board-ready?

Schedule a free 30-minute consultation: bay-biz.com/schedule-a-call/