



Presentation Summary

Title: Making Your Life Easier with Technology

Presented By: Miranda Schrubbe

Will you be using Power Point Slides? no If yes, please share them with us so we can make them available to attendees. When can we expect your slides? _____

Summary of Presentation: (please provide a brief, 1-2 paragraph description of your topic)

Does your board have a record retention policy and plan? In order to manage and maintain your organization's records, particularly corporate and financial records, you should develop and keep a record retention plan that lists documents that need to be kept, where and in what format, who is responsible for maintaining (and destroying), and how long various documents are to be kept. I will be sharing our record retention plan for Impact 100 Baldwin County. I will also introduce you to "BOARDnetWORK" – a web-based board management tool where documents can be stored electronically; meeting agendas can be created, complete with meeting documents; board member contact info can be kept and used for communications; and users can access a governance resource library.

Key Take-Aways: (Bullet list of key points, action items, resources, etc)

- It is important for a nonprofit to have a plan for record retention so that board members and officers know their responsibilities for storing and destroying documents
- The IRS expects nonprofit organizations to have a record retention policy; the Form 990 asks if your organization has one
- Sample of record retention plan (handout will be provided)
- Online board management portal, BOARDnetWORK, available free as a benefit to nonprofits insured through insurance providers that belong to Nonprofits Insurance Alliance Group (visit this web page to see if this is available in your state: <https://insurancefornonprofits.org/insurance-brokers/states-covered/>); available to non-member nonprofits for \$650 per year. Product overview available here: http://www.insurancefornonprofits.org/resources/BNW_prod_overview.pdf and demo available here: www.boardnetwork.org