

GET IN YOUR LANE

Non-profit leadership roles, and how they build a sophisticated organization

Executive Director (ED)

Board Chair

Board

Vice Chair (VC)

DO THIS

DO THIS

DO THIS

DO THIS

SHARED RESPONSIBILITIES: FUNDRAISING, FOLLOW LAW, BE AMBASSADOR, RECRUIT PEOPLE

Hiring staff/vendors & set job descriptions/compensation

Managing staff, vendors, & contracts (may delegate)

Leads all fundraising plans/strategy (may delegate)

Create all operational policies & tasks (Facility & Activities)

Main public messenger (with special exceptions)

Create & implement all programs (with board approval)

Identify & manage/limit risk

Assist board in creating the vision & strategic plan

Lead capacity building efforts

Lead mission & goal attainment efforts

Lead budget process with Chair

Ensure timely & accurate financials

Create & lead all systems of the organization (except board)

Lead & manage board processes, members and Executive Committee

Create, populate committees & be ex-officio of all committees

Follow all bylaws, laws, & rules (elections/votes)

Serve as a main public messenger (discuss with ED)

Lead board & ED evaluation & orientation process

Establish clarity of board roles & responsibilities (Board Agreement)

Communicate regularly with ED & Board

Create & pass budget with support of ED

Setting up bank accounts (with ED & Treasurer)

Recruit, retain & hold board members accountable

Sole supervisor of ED

Lead all aspects of ED onboarding & transitions. (may delegate)

Support Chair in all tasks
Duty of Care, Loyalty, & Obedience

Shape & honor mission, goals, legacy, bylaws

Cast informed votes

Raise 10-20% of org's budget through "give or get" policy

Cultivating financial support (self & others)

Reviewing organizational finances regularly

Set policy

Attend all meetings

Delegate tasks to comm.

Assist BC in onboarding and transition of ED

Reduce or eliminate conflicts of interest

Serve on Executive Committee

Understand and Assume chair role as needed

DON'T DO THIS

Allow board or staff to see unnecessary drama

DON'T DO THIS

Evaluating the staff
Not be the main funder

DON'T DO THIS

Assigning tasks to staff

DON'T DO THIS

Undermine the Chair



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This is not intended to be a list of all things done by these roles. It is the main list and delineates where lines may blur.

Treasurer

Secretary

Committee Chairs (CC)

Staff

DO THIS

DO THIS

DO THIS

DO THIS

SHARED RESPONSIBILITIES: FUNDRAISING, FOLLOW LAW, BE AMBASSADOR, RECRUIT RESOURCES

Track & provide timely accurate financials
 Be an authorized signer on accounts
 Play lead role in audit & audit committee
 Serve on EC & Finance Committee
 Board's main steward of financial health & compliance
 Assist in budget, 990, & financial statements

Lead record keeper for board, government, & stakeholders
 Oversee taking & distribution of minutes
 Serve on Executive Committee
 Provide public notice of meetings if required
 Assume chair role, if others are absent.
 Notify board of mtgs far in advance

Lead committee meetings & process
 Accomplish goals set by committee & delegated by board
 Report out on progress to full board
 Recruit new committee members for sustainability

Reporting to the ED or ED's Delegate
 Implementing Activities/Operations
 Implementing fundraising activities
 Gather performance data on programs
 Informing ED of liability or organizational problems
 Follow laws & employment manual

DON'T DO THIS

DON'T DO THIS

DON'T DO THIS

DON'T DO THIS

Accounting or bookkeeping

Not an actual secretary

Skip committee meetings because there is no quorum

Undermine the ED by complaining to the board unless its a major infraction



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