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

DON'T DO THIS

DON'T DO THIS

DON'T DO THIS

Allow board or staff to see unnecessary drama

Evaluating the staffNot be the main funder

Assigning tasks to staff

Undermine the Chair

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GET IN YOUR LANE

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 Committe

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



Accomplish goals set by committee & delegated by board

Report out on progress to full board

Recruit new commitee members for sustainability



Reporting to the ED or ED's Delegate

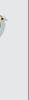
Implementing Activities/Operations

Implementing fundraising activities

Gather performance data on programs

Informing ED of liability or organizational problems

Follow laws & employment manual









DON'T DO THIS

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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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