

# Clarifying Board/Staff Roles and Responsibilities

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Activity	Typical All Volunteer	Typical staff administrator/ coordinator (paid or vol)	Typical ED w/ no or small staff	Your Organization
<b>BOARD</b>				
Board Governance <input type="checkbox"/> Define organization mission <input type="checkbox"/> Ensure mission-based decisions <input type="checkbox"/> Develop organizational policies <input type="checkbox"/> Create an organizational vision <input type="checkbox"/> Create a long-range plan <input type="checkbox"/> Hiring and Evaluating the Admin/ED <input type="checkbox"/> Review regular financial reports <input type="checkbox"/> Review regular reports on program participation, effectiveness, and impact	Board	Board Leads	Board Leads with increasing ED role	
Establish and lead board committees	Board	Board Leads	Board Leads	
Establish annual goals and objectives to meet long-term or strategic plan	Board	Board Leads	Staff Leads	
Executive Committee	Makes urgent and operating decisions	+ Directs work of the Administrator	Occasional urgent decisions, mainly plan board work w/ED	
Develop Meeting Agendas	Board Chair	Board Chair	Chair & ED	
Board Development <input type="checkbox"/> Define desired Board Composition <input type="checkbox"/> New Board Member Recruiting <input type="checkbox"/> Board Evaluation	Board	Board Leads	Board Leads	
Board Chairperson <input type="checkbox"/> Appoint Board Committee Chairs and Members <input type="checkbox"/> Settle disagreements/tension between board members or board committees <input type="checkbox"/> Work with ED to resolve any issues brought to attention of Board	Board Chair	Board Chair	Board Chair	
Report on progress against annual and plan goals	Board	Staff Leads	Staff Leads	
Prepare and Distribute Board Meeting Packets	Board	Board Leads (Directs)	Staff	
Establish program evaluation methods/process	Board	Board Leads	Shared, Staff Leads	
Sign legal documents	Board	Board Leads	Shared w/ Approval Authority	
Take minutes at Board meetings	Board	Org Preference	Org Preference	
Initiate merger or closing discussions	Board	Board Leads	Shared	

<b>DAILY OPERATIONS</b>				
Programs <input type="checkbox"/> Assess community needs <input type="checkbox"/> Research and Develop programs <input type="checkbox"/> Assess programs	Board	Board Leads	Shared, Staff Leads	
Track Board decisions thru implementation	Board	Staff Leads	Staff Leads	
Hire, train, discipline, fire staff (except ED)	Board	Board Leads	Staff Leads	
Decide when to add additional staff	Board	Board Leads	Shared, often through budget process	
Processing and acknowledging donations	Board	Staff Leads	Staff	
Recruit Volunteers	Board	Staff Leads	Staff Leads	
Develop operating procedures	Board	Board Leads	Staff	
Ensure daily security of facility and assets	Board	Staff Leads	Staff	
Maintain program records	Board	Staff Leads	Staff	
Telephone and office coverage	Board	Staff Leads	Staff	
Daily correspondence	Board	Staff Leads	Staff	
Address discord between staff members	Board	Board Leads	Staff	
Build partnerships with other organizations	Board	Board Leads	Staff Leads	
<b>FUND RAISING</b>				
Develop Fundraising Plans	Board	Board Leads	Shared, Staff Leads	
Implement Annual Fund	Board	Often Shared	Staff Leads	
Cultivate and Ask Major Donors	Board	Board Leads	Staff Organizes	
Raising visibility in the community	Board	Board Leads	Staff Organizes	
Researching and writing grants	Board	Board Leads	Staff Leads	
<b>FINANCE</b>				
<input type="checkbox"/> Form a Finance/Audit Committee <input type="checkbox"/> Determine whether an audit is required, select auditor, and receive audit report. <input type="checkbox"/> Ensure appropriate internal controls	Board	Board Leads	Board Leads	
<input type="checkbox"/> Ensure payment of bills and payroll <input type="checkbox"/> Ensure routine expenditures are within budget	Board	Staff Leads	Staff Leads	
<input type="checkbox"/> Create big-picture budget goals/ parameters <input type="checkbox"/> Assemble the proposed annual budget for approval	Board	Board Leads	Shared, Staff Leads	
Review/authorize expenditures beyond budget	Board	Board Leads	Board Leads	
<b>RISK MANAGEMENT</b>				
Assess potential risks, implement strategies to reduce liability	Board	Board Leads	Shared, Staff Leads	
Obtain appropriate insurance and maintain coverage	Board	Staff Leads	Staff Leads	