

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 and set job descriptions/compensation

Managing staff, vendors, and contracts (may delegate)

Leads all fundraising plans/strategy (may delegate)

Create all operational policies and tasks (facility and activities)

Main public messenger (with special exceptions)

Create and implement all programs (with board approval)

Identify and manage/limit risk

Assist board in creating the vision and strategic plan

Lead capacity building efforts

Lead mission and goal attainment efforts

Lead budget process with Chair

Ensure timely and accurate financials

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

Lead and manage board processes, members, and Executive Committee

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

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

Serve as a main public messenger (discuss with ED)

Lead board, ED evaluation, and orientation process

Establish clarity of board roles and responsibilities (Board Agreement)

Communicate regularly with ED and Board

Create and pass budget with support of ED

Setting up bank accounts (with ED and Treasurer)

Recruit, retain and hold board members accountable

Sole supervisor of ED

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

Support Chair in all tasks

Duty of Care, loyalty, and obedience

Shape and honor mission, goals, legacy, and bylaws

Cast informed votes

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

Cultivating financial support (self and 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 and provide timely accurate financials

Be an authorized signer on accounts

Play lead role in audit and audit committee

Serve on EC and Finance Committee

Board's main steward of financial health and compliance

Assist in budget, 990, and financial statements

Lead record keeper for board, government, and stakeholders

Oversee taking and 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 and process

Accomplish goals set by committee and 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 and employment manual

DON'T DO THIS

Accounting or bookkeeping

DON'T DO THIS

Not an actual secretary

DON'T DO THIS

Skip committee meetings because there is no quorum

DON'T DO THIS

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



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