

BOARD & STAFF WORKING TOGETHER

What are the primary roles of the board, the CEO, and support staff? Who does what and how can we work together more efficiently?!

ROLES & EXPECTATIONS

The partnership between the board and CEO and the board and staff can be complicated and tricky to navigate at times. These relationships are also dependent on the size of the board and where it is in its lifecycle. Below are definitions and guidance for simplifying communication and clarifying the roles of board members and staff.

THE BOARD

The board functions as a team. Individual board members inherently have no authority- no individual rights – over the organization but must assume accountability for their own actions. The full governing body has three main focuses:

- **Direction:** The board guards the mission of the organization and, through guidelines, steers it in the right direction.
- **Oversight:** The board monitors the activities, the health, and the legal and ethical behavior of the organization.
- **Resources:** The board ensures that the organization is well-equipped to fulfill its mission (i.e., adequate finances, qualified CEO, etc.)

STAFF

When the board hires a CEO it delegates the daily management to that person. The CEO reports to the board and any staff who are subsequently hired report to the CEO. The CEO is responsible for maintaining regular contact with the board, particularly the Chair/President. The staff helps the CEO more efficiently implement the directives set by the board.



The Nonprofit Strategy Group

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BREAKDOWN OF ROLES & RESPONSIBILITIES

OVERSIGHT

PLANNING & EVALUATION

FINANCES

BOARD: Health & Success of the Organization

- Drafts and/or approves broad policies to guide and protect the org, board, and staff
- Monitors that all legal requirements get proper attention
- Hires the CEO and delegates daily operations
- Expects regular and objective reports from staff

CEO: Admin & Programming

- Oversees daily operations and ensures appropriate staff and operations policies are in place
- Hires staff and delegates operational responsibilities to staff

BOARD: Strategic Framework

- Adopts an overall strategic mindset by focusing on the big picture issues
- Actively participates in strategic sessions and retreats
- Annually evaluates the performance of the CEO
- Evaluates its own performance regularly
- Assesses goal achievement

CEO: Strategic & Operational Plans

- Ensures that strategic planning happens with the board's appropriate involvement
- Leads operational planning
- Ensures a process for staff performance exists, & sets staff compensation

BOARD: Fiduciary Duty Over the Organization

- Makes sure adequate financial expertise is present on the board
- Sets overall fiscal policies and ensures appropriate internal controls
- Approves the annual budget and monitors carefully the financial reports
- Hires an auditor and reviews the audit

CEO: Financial Management

- Prepares the annual budget and provides the board with regular financial statements
- With staff, handles the daily financial operations and monitors cash flow

BOARD & COMMITTEE MEETINGS

Staff other than the CEO can attend board meetings when requested and often serve as administrative liaisons for committee meetings. Committees are generally made up of board members and community stakeholders with expertise and interest in the subject matter. In general support staff are present to provide answers to questions and updates on programs and services at the discretion of the CEO. The board relies on the CEO and support staff to make sure the organization runs efficiently and effectively so that they can perform their oversight duties. Ultimately, working together, board and staff are responsible for meeting the needs of the broader community.