

Board and Staff – Who Does What?

The following is provided for policy making boards. It reflects the generally accepted practices and identifies the general responsibilities of the board of directors and paid staff. Boards and staff may want to discuss the similarities and differences between these and the practices and responsibilities within their own agency.

It is recognized that each agency may assign responsibilities somewhat differently. Some of the responsibilities indicated as primary to the executive might be delegated to other staff in a large agency. In an agency without paid staff the board members may perform some of the functions indicated for the executive or staff. The responsibility of some tasks are flexible and based on agreement between board and staff depending on the situation.

Function/Task

Responsibility

1 – Primary

2 – Secondary/input and assistance

3 – Based on agreement

A. Planning

1. Determine basic agency purpose and goals.
2. Determine which community needs should be met and to what extent.
3. Determine categories of service to be provided.
4. Develop long-range plans for the agency.
5. Develop programs to meet identified needs.
6. Set specific program objectives.
7. Establish funding levels needed to run the agency.
8. Develop program evaluation system.

B. Policy

1. Provide background information necessary for policy decisions.
2. Give input to policy.
3. Make policy.

	Board	Executive Director/ Admin	Staff
	1		
	1	2	
	1	2	
	1	2	
		1	2
		1	2
		1	2
		1	2
		1	2
		2	
	1		

C. Fund-Raising

- 1. Develop fund-raising plans.
- 2. Give input to policy.
- 3. Solicit funds and other resources.
- 4. Evaluate fund-raising success.

D. Financial Management

- 1. Prepare agency budget.
- 2. Review and approve agency budget.
- 3. Monitor how funds are spent on a day-today basis.
- 4. Monitor total funding picture.
- 5. Engage an auditor for annual audit.
- 6. Do bookkeeping.

E. PERSONNEL

- 1. Develop agency personnel policies.
- 2. Recruit, screen, hire, supervise and terminate:
 - a) executive director
 - b) paid staff
 - c) board members
 - d) direct-service volunteers
- 3. Provide training and development opportunities for:
 - a) executive director
 - b) paid staff
 - c) board members
 - d) direct-service volunteers

	Board	Executive Director/ Admin	Staff
1. Develop fund-raising plans.	2	1	
2. Give input to policy.	3	3	
3. Solicit funds and other resources.	3	3	
4. Evaluate fund-raising success.	3	3	
1. Prepare agency budget.		1	2
2. Review and approve agency budget.	1		
3. Monitor how funds are spent on a day-today basis.		2	
4. Monitor total funding picture.	1	2	
5. Engage an auditor for annual audit.	1		
6. Do bookkeeping.			1
1. Develop agency personnel policies.	1	2	
2. Recruit, screen, hire, supervise and terminate:			
a) executive director	1		
b) paid staff		1	
c) board members	1		1
d) direct-service volunteers			
3. Provide training and development opportunities for:			
a) executive director	1		
b) paid staff		1	
c) board members	1		
d) direct-service volunteers			1

4. Develop evaluation procedures and evaluate the performance of:

- a) executive director
- b) paid staff
- c) board members
- d) direct-service volunteers

F. PUBLIC RELATIONS

- 1. Develop a formal public relations plan.
- 2. Implement the public relations plan.
- 3. Serve on the boards of other community agencies.
- 4. Maintain contact with provincial and national organizations with similar interests.
- 5. Establish method of assessing management practices which impacts "internal" public relations.

G. BOARD RECRUITMENT

- 1. Develop board nominating procedures.
- 2. Suggest potential members to the nominating committee.
- 3. Develop board orientation and training.

Board	Executive Director/ Admin	Staff
1	1	
1		1
2	1	
	1	2
3	3	
1	1	
	1	
1		
1	2	
1	2	