

# BOARD CHAIR AND CHIEF EXECUTIVE RESPONSIBILITIES

A strong partnership between the chief executive and board chair is essential to leading an effective organization. When the relationship goes awry, it's often due to confusion over individual responsibilities.

In general, the chief executive's role is focused on management and working with staff to implement programs and initiatives in support of the mission. The board chair is responsible for governance and oversight, leading the board in evaluating the organization's work from a macro-perspective and ensuring that the work advances the mission in an ethical and legal manner.

But how do these general roles manifest in key responsibilities, such as fundraising or board meetings? Read on to find out.

## POLICY AND PLANNING

Board Chair/Governance	Shared	Chief Executive/Management
<ul style="list-style-type: none"> <li>Develops and/or reviews guiding principles (mission, vision, values) and policies</li> <li>Ensures effective planning, overseeing board involvement in development and approval of strategic plan</li> <li>Monitors organization's programs and services in support of the mission and strategic plan</li> </ul>	<ul style="list-style-type: none"> <li>Strategic planning and program evaluation</li> <li>Mission impact</li> <li>Organizational growth and sustainability</li> </ul>	<ul style="list-style-type: none"> <li>Commits to and carries out mission</li> <li>Provides administrative support for board policymaking</li> <li>Engages the board in planning</li> <li>Implements strategic plan</li> <li>Monitors the quality and effectiveness of individual programs, providing board with data and information needed to evaluate program effectiveness, impact, and outcomes</li> </ul>

## BUDGET AND FINANCES

Board Chair/Governance	Shared	Chief Executive/Management
<ul style="list-style-type: none"> <li>Ensures adequate financial resources; protects assets; provides financial oversight</li> <li>Reviews and approves annual budget</li> <li>Oversees annual audit process</li> </ul>	<ul style="list-style-type: none"> <li>Fiscal stewardship</li> </ul>	<ul style="list-style-type: none"> <li>Prepares and proposes budget to board</li> <li>Manages programs according to board-adopted financial policies and budget guidelines</li> </ul>

FUNDRAISING AND DEVELOPMENT

Board Chair/Governance	Shared	Chief Executive/Management
<p>Maximizes board member participation in resource development; oversees approval of fundraising plan</p> <p>Attends fundraising events, cultivates donors, and makes a personal contribution</p> <p>Solicits contributions from board members</p>	<p>Solicit contributions from outside donors</p> <p>Engage board members in fundraising activities</p> <p>Evaluate effectiveness of fundraising strategies</p>	<p>Develops fundraising plan and coordinates overall fundraising efforts</p> <p>Ensures staff support for board fundraising</p> <p>Updates board on development efforts</p>

BOARD MEETINGS

Board Chair	Shared	Chief Executive
<p>Leads and facilitates board meetings</p>	<p>Develop meeting agenda</p>	<p>Ensures that board members have necessary information and meeting materials</p> <p>Attends meetings, except specific executive sessions</p>

COMMITTEE WORK

Board Chair	Shared	Chief Executive
<p>Ensures that board has effective committee and task force structure</p> <p>Appoints board committee and task force chairs</p> <p>Serves as ex officio, non-voting member of all committees, except the governance committee when discussing elections</p> <p>Keep board informed of committee and task force work</p>	<p>Develop and review committee structure and individual committees to ensure alignment with mission and strategic goals</p> <p>Identify committee members</p>	<p>Sits in on appropriate committee meetings as non-voting member</p> <p>Ensures that committee members have staff support and needed materials/information</p>

### BOARD RECRUITMENT AND DEVELOPMENT

Board Chair	Shared	Chief Executive
<ul style="list-style-type: none"> <li>Ensures strategic board building and recruitment</li> <li>Sets goals and expectations for the board</li> <li>Cultivates leadership among individual board members</li> <li>Prioritizes board development, including orientation and educational sessions</li> </ul>	<ul style="list-style-type: none"> <li>Identify skills, expertise, and attributes needed for the board</li> <li>Keep all board members engaged in the work of the organization</li> </ul>	<ul style="list-style-type: none"> <li>Develops and sustains strong working relationships with board members</li> <li>Shares appropriate information to keep board informed and educated about ongoing organizational activities and changes in the field in which the organization works</li> <li>Identifies potential new board members and participates in orientation</li> </ul>

### BOARD ASSESSMENT

Board Chair	Shared	Chief Executive
<ul style="list-style-type: none"> <li>Ensures regular opportunities for assessment</li> <li>Oversees comprehensive board assessment every two years</li> </ul>	<ul style="list-style-type: none"> <li>Evaluate assessment results and identify board development opportunities in collaboration with governance committee</li> </ul>	<ul style="list-style-type: none"> <li>Assists board assessment process</li> </ul>

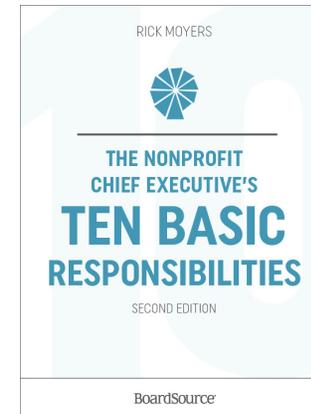
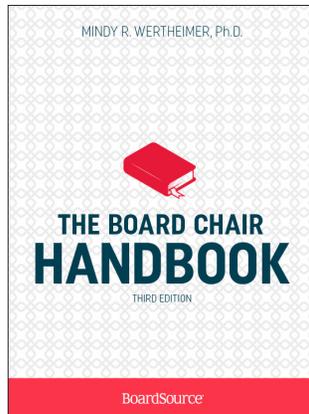
### STAFF OVERSIGHT, COMPENSATION, EVALUATION

Board Chair	Shared	Chief Executive
<ul style="list-style-type: none"> <li>Oversees hiring, compensation, and evaluation of chief executive</li> <li>Ensures chief executive succession plan exists</li> </ul>	<ul style="list-style-type: none"> <li>Provide general oversight to ensure strong and effective staff resources</li> </ul>	<ul style="list-style-type: none"> <li>Oversees and evaluates all staff</li> <li>Sets staff salaries within budget constraints</li> </ul>

PUBLIC RELATIONS AND COMMUNICATIONS

Board Chair	Shared	Chief Executive
Promotes the work of the organization and encourages board members to do so as well; advocates for the organization’s mission with public policy makers Speaks for the board when a controversy or crisis arises	With full board and staff, develop message that conveys the organization’s mission effectively and can be used consistently by everyone within the organization Public policy advocacy	Serves as public face and official spokesperson for the organization Coordinates public relations and communications and advocacy efforts

RESOURCES



Please note that this delineation of roles and responsibilities is recommended practice and may not apply to all organizations, including those small and new organizations without staff.