

DIAGNOSTIC – BOARD, STAFF and VOLUNTEER RESPONSIBILITIES

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	BOARD	EXECUTIVE DIRECTOR	STAFF	VOLUNTEERS OR MEMBERS
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OPERATIONS (list all major programs and include program planning, budgeting, execution and evaluation. Gain agreement on the goals of each program – how will you know you are successful?)				
FUND-RAISING (include the development of the fund-raising plan, and each fund-raising element including grant-writing, membership drives, major donors, capital campaigns, etc)				
BUDGETING (include budget development, approvals, and maintenance for one-year and longer-term (3-5 year) budgets				

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FINANCIAL PLANNING (include audits and risk assessment here)				
ORGANIZATIONAL PLANS (include salary and recognition plans, hiring, job description writing, employee appraisals, succession planning, organizational changes.)				
MEMBERSHIP OR VOLUNTEER INTERFACE (include recruitment of new members or volunteers, benefits, retention of existing members or volunteers and key activities)				

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MARKETING Include messages, media (brochures, web site, media/PR, etc), and target audiences (community, staff, members, volunteers, clients, board, etc). Who determines and approves key messages? Who ensures board, staff and volunteers are marketing the same message?				
STRATEGY and POLICY (include the development and approval of the 3-5year strategic plan, key partnerships custodians, and who surfaces and determines policy decisions.				

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BOARD ISSUES (include board recruitment, orientation, communication with staff, board meeting management, committee success, assessment of the board)				
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DIRECTIONS: Start with the Executive Director and the Board President. Have them each fill out this chart – which will reflect their opinions. Compare notes about what’s important and who’s responsible for what. Once there is agreement between these the Executive Director and the Board President, share this with the rest of the staff, volunteers, and the board. Make sure that everyone understands their role in the overall plan.