

Board/Staff/CEO Roles Quiz

Function	Board	CEO	Staff	Notes
1. Develop an annual budget		√	√	
2. Approve the annual budget as a matter of policy	√			
3. Make hiring decisions for staff other than the Executive Director		√		
4. Develop new programs or service (in conjunction with strategic planning objectives).		√	√	
5. Assess the performance of the board	√			
6. Assess the performance of the executive director	√			
7. Address performance issues and/or grievances related to staff and volunteers	√	√		
8. Complete the IRS Form 990 informational return and other government reports		√	√	
9. Approve the IRS Form 990 informational return for submission	√			
10. Establish the Mission for the organization	√	√		
11. Establish policy regarding programs		√	√	
12. Create the agenda for Board meetings	√	√		
13. Monitor income and expenses on a weekly basis		√	√	
14. Establish policy regarding the role of the Board and expectations of its members	√			
15. Select the auditor	√	√		
16. Revise the organization's mission, vision and values statements. Strategic planning initiative	√	√		
17. Exercise legal and fiduciary oversight of the organization	√	√		
18. Identify, recruit, select, train, and engage Board members	√	√		
19. Create a fundraising plan	√	√		
20. Assure that the organization balances its mission with the resources available	√	√		
21. Engage in day-to-day management of the organization		√	√	
22. Conversations between board members and staff		√		
23. Board member requesting copies of reports and information			√	
24. Requests to create new reports and tasks		√		