

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 | | | | |