



Board Roles and Responsibilities

Organizations have vital, distinct, and continuous life cycles: they grow, develop, sustain, and renew. At the early stages, an organization's focus revolves around setting up the right framework internally and externally, designing programs that support the mission and organizational values, and building a committed constituency. As the organization matures, the fast pace of growth allows for precious few moments of reflection and evaluation. During high-growth periods and/or when an organization "hits a wall," (whether that wall is a leadership transition, financial crisis, or some other defining event), various issues invariably emerge that potentially challenge a Board's leadership efficacy.

Fundraising and resource building will not be successful without the right qualities, minds, and leadership on the Board. Conversely, Board members cannot be effective fundraisers without, in an intentional fashion, being visionary and strategic in their decision-making and practices toward that end. Providing structure, focus, and engaging tasks that suit a Board member's comfort level as well as genuinely advance prospective donor relationships will move an organization towards success. At the end of the day, success depends on consistently and effectively communicating the mission of the organization and how it empowers its constituencies, and having Board members do this more effectively with potential donors every day.

This three part series of articles (Board Roles and Responsibilities, Board Structure and Function, and Building a Generative Board) will share some of the practices of effective organizations that have long-term capacity and consistently demonstrate the ability to attract and retain supporters, leaders, and ambassadors for their work.

Nonprofit organizations always long for, and benefit from, a high level of engagement and involvement from their Board members. Board members typically believe deeply in the mission and goals of the organization, and their actualization. Often it is easier for Board members to work in the 'comfort' of management roles they are familiar with. Some of the typical reasons that a board micro-manages include:

- The Board has no clear sense of its role in the organization.
- The Board has no clear set of rules to define which decisions belong to the staff and which belong to the Board.
- Management of day-to-day work is the work with which Board members are more experienced and confident.
- Board members were invited on the board to perform a task, not to lead.



In addressing each of these reasons, the following are guidelines of Board roles and responsibilities that an organization can consider adopting:

- Establish and be accountable for the mission, values, and vision
- Develop and monitor a long-range strategic plan
- Establish policies related to the governance of the organization
- Approve an annual budget and be involved in securing the financial resources necessary to achieve the annual operating goals
- Employ and review annually the performance of the executive director
- Assess performance as a Board and of individual Board members on a regular basis
- Elect officers who will assure the highest quality of Board leadership
- Be smart stewards of the organization's resources; human, economic, and social capital

Here are some recommendations to create effective Board roles and responsibilities:

- Implement annual, individual Board member self-evaluations, and evaluation of the Board as a group (tools/resources for this work are available through BoardSource)
- Create a Board letter of agreement detailing responsibilities of individual members to be discussed with all current and new Board members
- Utilize Board meetings to creatively educate Board members about relationship building (key to fundraising), communicating programmatic work, and strategic plan updates
- Provide Board leadership trainings for officers of the Board

References:

1. Donors Forum of Chicago. "Board of Directors: Roles and Responsibilities."
2. Gottlieb, Hildy. "Governing for What Matters: A Model for Community-Driven Governance."
3. Gottlieb, Hildy. "Why Boards Micro-Manage and How to Get Them to Stop".
4. Rodrigues, Olivia. "Case Study paper. Graduate Class on Board Governance and Volunteer Management."