



**THE FORBES FUNDS
FINANCIAL MANAGEMENT
SERIES**

501(c)(3)²

(412) 201-2331
LDickerson@verizon.net

WHOSE JOB IS IT?

Which of these items are the responsibility of the Board, the Board Chair, the Executive Director, the Executive Director in concert with his/her staff, or both the Board and the Executive Director?

	BOARD	BOARD CHAIR	STAFF	EXEC. DIRECTOR/ CEO
Determine the organization's goals				
Solicit funds from colleagues and friends for the organization				
Interview Executive Director candidates				
Hire the Executive Director				
Evaluate the Executive Director				
Evaluate the Board's performance annually				
Keep board members informed of operations				
Formulate policy				
Implement policy				
Administer all phases of operations				
Hire & supervise professional staff				
Plan methods of program delivery				
Implement programs				
Be responsible for meeting all legal requirements				
Identify prospective new directors				
Determine whom to invite to serve on the board				
Orient, train and develop board members				



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	BOARD	BOARD CHAIR	STAFF	EXEC. DIRECTOR/ CEO
Draft the annual operating budget				
Approve annual budget				
Approve staff expense reports				
Approve Executive Director's expense reports				
Perform routine daily/weekly functions				
Sign routine small checks				
Sign large, significant checks				
Hire and manage consultants/subcontractors/contractors				
Establish salary administration plan				
Implement salary administration plan				
Conduct staff performance reviews				
Prepare information on strategic choices for the board				
Handle staff conflicts				
Serve as first responder to staff complaints				
Respond to staff complaints regarding the Executive Director				
Respond to employee allegations about potential infractions of the law				
Be a spokesperson for the organization in a crisis				
Respond to media inquiries				
Handle customer/client complaints				
Appoint board members to various committees				
Provide community relations contacts with the community				
Evaluate Executive Director annually				
Evaluate organization's results				



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