

# LEADERS CHECKLIST

## (BASIC ORGANIZATION STRUCTURE)

**COMMUNITIES ORGANIZE TO GAIN CONTROL AND POWER.** Residents of communities seek for control because they want more participation in the processes that govern their communities and lives. They want the political process to be more responsive to their needs. Residents are learning that community organizing allows them to take aggressive rather a passive approach to dealing with issues in their communities. They also have recognized that community organizing helps to teach them when to apply pressure, where to apply pressure, how to apply pressure and who to apply pressure to in resolving issues for their communities. More important, communities are learning that by dealing with issues together, they can fight back and win.

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## **The Responsibilities of a Board of Directors**

- ◆ Establish and protect the mission of the organization
- ◆ Determine priority goals and delegate responsibility to carry them out.
- ◆ Be accountable both to the organization's consumer population and to the broader community.
- ◆ Represent the organization to the public.
- ◆ Establish procedures for accountability within the organization.
- ◆ Hire a chief executive officer and evaluate her/his performance regularly.
- ◆ Evaluate program services regularly.
- ◆ Manage the assets of the organization.
- ◆ Establish personnel policies.
- ◆ Review bylaws and tax exemption papers periodically.
- ◆ Administer all contracts and insurance policies entered into by the organization.
- ◆ Approve an annual budget and regularly review financial statements.
- ◆ Manage fundraising activities.
- ◆ Review the annual audit and approve organization's response to audit.

**Note:**

**This document is meant as a general guideline for organization and should be revised to fit the purpose and size of the community organization applied to.**

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## ROLES AND RESPONSIBILITIES OF BOARD AND STAFF

<b><u>Board</u></b>	<b><u>Staff</u></b>
Make final decisions on policies relating to personnel, finance, public relations and services.	Carry out work authorized by policy making body.
Expertise in a variety of technical and leadership areas needed by organization	Educated and experienced in professional skills needed by organization.
Expected to know history, purpose, program, policies and practices of organization.	Responsible for understanding job to which he/she is assigned.
Prepared by general experiences and interest in organization work to represent the community.	Responsible for learning about community, organization and clientele being served.
Expected to know duties delegated to staff.	Make day to day decisions required to do the work of the organization.
Available to staff for consultation on matters of common concern.	Consult with professionals in order to make wise decisions.
Interpret informally the work of organization in day to day contracts, and formally when requested.	Act as bridge between board and organization, and as a bridge between cultures in a culturally diverse organization.
Insure financial support for organization work.	Direct work of other staff members assigned to him/her, define duties, give support.
Evaluate work of organization with assistance of staff.	Help board make good decisions based on complete information.

# The Officers As A Work Group

The Executive Committee

## Duties and Responsibilities

- ◆ Plan work program of board
- ◆ Coordinate annual planning and budget process Select items for board consideration
- ◆ Facilitate decision making process of board at the policy-making level
- ◆ Provide a committee structure to work on issues and give board members opportunity for development
- ◆ Maintain flow of work between board and its committees Schedule major policy consideration over a long time period to allow for information flow, alternative development, education, discussion and testing of option
- ◆ take action in the name of the board by telephone conference call between board meetings when a quick decision is needed to respond to crisis or opportunity

## A Chart of Duties and Responsibilities

<b>President</b>	<b>Vice President (one or more)</b>	<b>Secretary (one or more)</b>	<b><u>Treasurer</u></b>
<ul style="list-style-type: none"> <li>◆ Preside at meetings</li> <li>◆ Maintain overview of business of agency</li> <li>◆ Insure all policies of board are followed</li> <li>◆ Represent organization</li> <li>◆ Appoint all committees</li> <li>◆ Serve as ex-officio member of committees</li> </ul>	<ul style="list-style-type: none"> <li>◆ Act in place of President</li> <li>◆ Perform specific jobs as assigned by board</li> </ul>	<ul style="list-style-type: none"> <li>◆ Keep record of Board</li> <li>◆ Keep minutes of Board</li> <li>◆ Handle Correspondence</li> <li>◆ Give all notices as required</li> </ul>	<ul style="list-style-type: none"> <li>◆ Keep custody of organization funds</li> <li>◆ Keep books of accounts</li> <li>◆ Report to board regularly</li> <li>◆ Arrange for audit of books</li> <li>◆ Sit on Finance and Budget Committees</li> </ul>

## **THE IMPORTANCE OF COMMITTEES**

1. Do the bulk of the work of the organization, thereby relieving overburdened officers
2. Increase the involvement of board members because they have a chance to work in areas where they are especially suited.
3. Provide a training ground for future leaders of the organization
4. Capitalize on the experience, training and contacts of a wide representation of the membership
5. Enhances the opportunities for members to participate meaningfully in the organization
6. Increase the visibility and outreach of the agency by including non-board members in committee membership.
7. Provide a means for communication and information to flow from the community, clients, line staff, through the committees to the board.
8. Provide opportunities for board members to get to know line staff.
9. Give members the chance to freely and fully discuss issues in an informal setting
10. Serve as excellent problem-solving and decision making groups because of their small size and informality.

# DUTIES AND RESPONSIBILITIES OF THE COMMITTEE CHAIRPERSON

## A Checklist

### **Duties and Responsibilities**

- 1. Build a team of your committee by bringing people along with you, working with them
- 2. Interpret the purpose and program of your organization to the committee
- 3. Understand and interpret your community to the organization and committee members
- 4. Be knowledgeable about services of other organizations
- 5. Use skills in human relations and knowledge of your committee members to help each attain the peak of performance
- 6. Accept and understand your committee's goals and objectives as they come to you from the board planning process
- 7. Guide your committee in long and short range planning
- 8. In the budget process, have your committee estimate costs of objectives and identify any income
- 9. Monitor implementation of committee objectives
- 10. When appropriate, decide with committee to take part in implementing objectives
- 11. Delegate responsibilities to committee members
- 12. Recognize conflicts and disagreements and use problem-solving skills to deal with them

# COMMITTEES

## SOME SPECIAL CONSIDERATIONS

Type of Committee Size	Charge	Make-up	Chairperson's Qualification	Relationship to Board Chair
<p><b><u>Standing</u></b> 5 to 9 members</p>	<ul style="list-style-type: none"> <li>• continuous responsibility</li> <li>• reaches collective decision</li> <li>• relieves the officers of many administrative burdens</li> </ul>	<ul style="list-style-type: none"> <li>• those who are interested in the subject matter of the committee activity</li> <li>• those with special skills</li> <li>• representative of board make-up</li> </ul>	<ul style="list-style-type: none"> <li>• should be senior to most members</li> <li>• doesn't hold strong opinions in committee's area of interest</li> <li>• should be autocratic enough to control agenda and permissive enough to allow consensus decisions on nearly unanimous reports</li> </ul>	<ul style="list-style-type: none"> <li>• he/she is ex-officio member</li> <li>• access to all meetings and records</li> </ul>
<p><b><u>Special</u></b> 10-30 people</p>	<ul style="list-style-type: none"> <li>• consideration of special, difficult problem, often complex and controversial</li> <li>• must come up with compromise that is acceptable to majority of committee members and board as a whole</li> <li>• must distribute committee report widely</li> </ul>	<ul style="list-style-type: none"> <li>• broadly representative of the whole board</li> <li>• all viewpoints of those involved in problem or controversy</li> </ul>	<ul style="list-style-type: none"> <li>• should have considerable seniority</li> <li>• strong leader with good command of parliamentary procedure</li> <li>• must guide committee to nearly unanimous decision</li> <li>• must be able to define issues, propose solutions and summarize group decisions</li> </ul>	<ul style="list-style-type: none"> <li>• chair is ex-officio but should allow maximum freedom to committee</li> <li>• appear at meetings <u>seldom</u>, if ever</li> <li>• give clear charge to committee as to what is expected and by when</li> </ul>

# 14 Traits Commonly Found In Outstanding Leaders

## A checklist

1. Leaders seem to be so completely wrapped up in their jobs that they can't spare the time to worry about the jobs they might get or about other people who seem to be getting ahead faster than they
2. Most leaders have hides as thick rhinoceros as far as their own personal pride is concerned, but they are extremely sensitive to the pride of others.
3. Most leaders instinctively listen more than they talk, and talk only when they have something worthwhile and appropriate to say.
4. When leaders listen they automatically sift out of the words they hear the central points of what the speaker has on his/her mind.
5. Having faith in the ability of their work to speak for itself, they are not afraid of their jobs or of anyone who threatens their jobs.
6. Most leaders are not naturally inclined to invent, or become authors, or create new systems, or demonstrate their own personal talents or accomplishments publicly. Neither do they spend much time selling themselves.
7. Leaders can recognize and evaluate the ability of others, encourage its development and employ it to the best advantage of all concerned.
8. Leaders win the confidence and respect of those who willingly accept them as references, judges and counselors.
9. All leaders control their temper to a marked degree-do not give away to uncontrolled enthusiasm or despair-but move from day to day on an even keel.
10. Leaders do not permit themselves to be bogged down with unimportant details. They are naturally inclined to brush aside details, with an eye for the key log in a jam.
11. Most leaders have a highly-developed intuition. While respectful of facts and logic, they are able to read between the lines and anticipate the answer to a problem before it is available.
12. Most leaders have the faculty of gaining confidence without becoming intimate with individuals.
13. Most leaders are incapable of intense hatred, grudges or bitter quarrels, and are not conscious of enemies.
14. All leaders suggest rather than order.