

**Finances, Personnel,
& Audits.**

**The Differing Roles
Of Board Members
& Staff.**

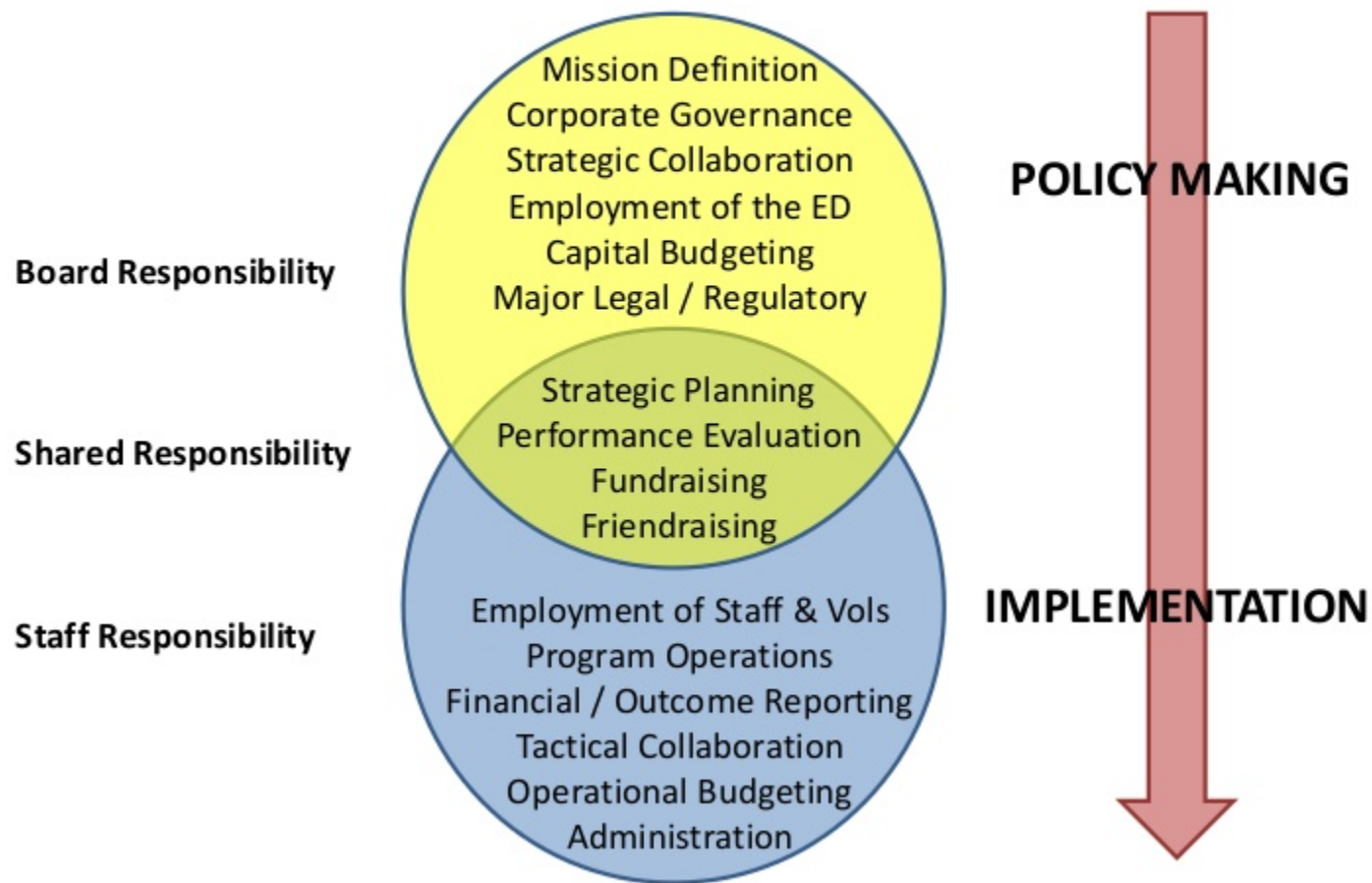


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Who Does What?

Roles and Responsibilities





Tax/Legal Issues

Staff Responsibilities:

- Notify board immediately if there are any delays in payroll, payroll tax payments, tax problems, tax penalties, or legal matters

Board Responsibilities:

- Respond to notification of any tax or legal issues with expedience
- Approve any correspondence dealing with a legal or tax matters



Accounting

Staff Responsibilities:

- Complete monthly statements within 3 weeks of the end of the month (Income Statement, Balance Sheet) with comparison to budgeted expectations
- Prepare end of year tax statements

Board Responsibilities:

- Choose treasurer or form a finance committee with members who understand GAAP
- Ask questions to ensure financial statements are understood
- Periodically review individual expenses



Cash Flow

Staff Responsibilities:

- If cash flow shortages are projected, develop a plan for bridging the shortages
- If cash flow surpluses are projected, develop a plan to maximize them

Board Responsibilities:

- Do not let the organization run out of money
- Ask for funding if promised and has yet to flow into the organization



Salaries & Personnel

Staff Responsibilities:

- Budget for salaries of staffing needs anticipated
- Ensure staff abide by personnel policies

Board Responsibilities:

- Approve salary range of each type employee
- Negotiate executive director's salary only
- Approve benefits plans for employees
- Approve personnel policies



Audit

Staff Responsibilities:

- Make all financial records easy for auditor to access
- Prepare a written response to audit
- Develop written set of internal controls to address any weaknesses revealed in audit

Board Responsibilities:

- Take the lead in interviewing and selecting auditor
- Meet at least once per year with auditor with no staff present
- Review written internal control procedures



Overall

Staff Responsibilities:

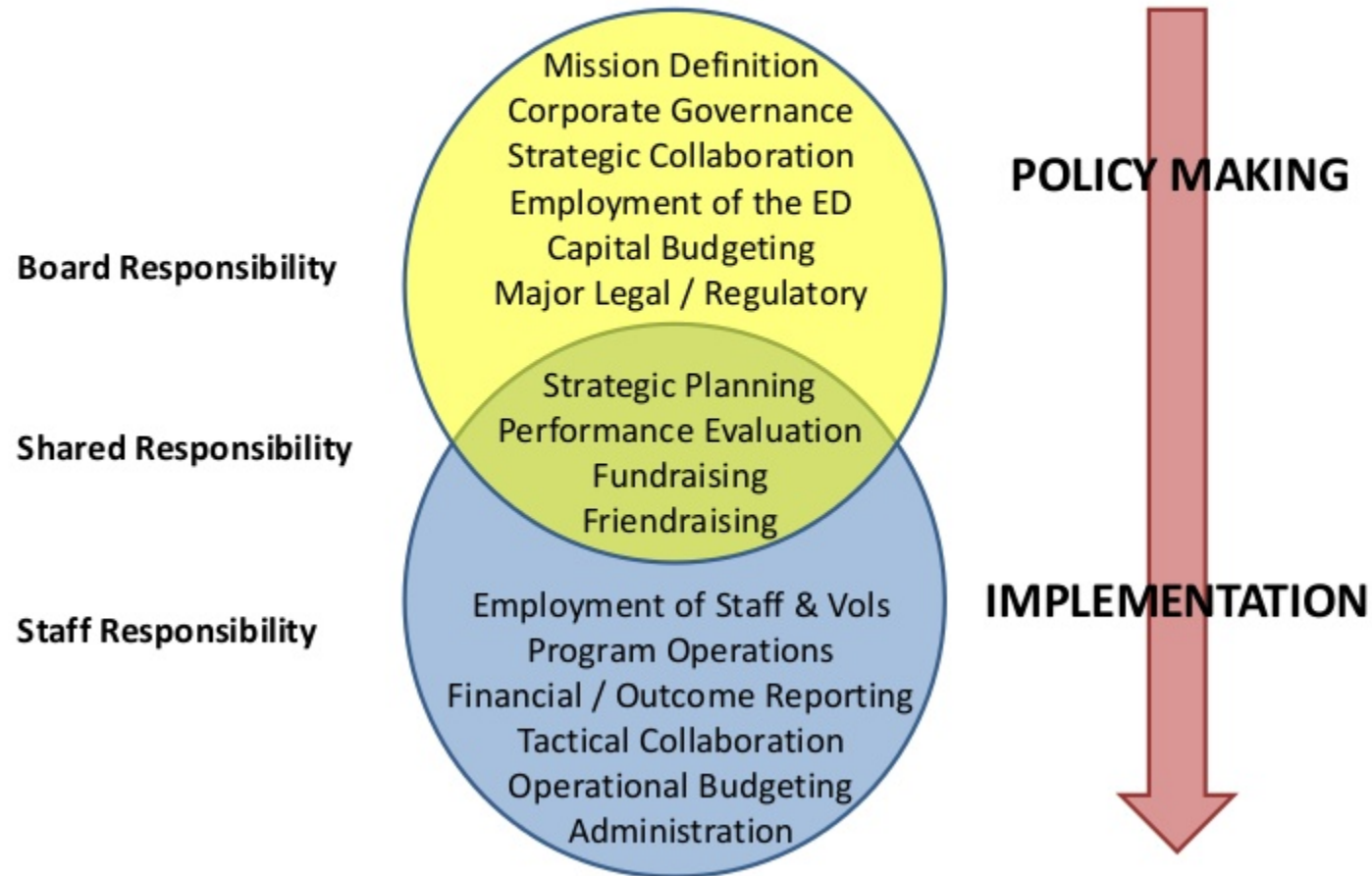
- Communicate well with Board
- Appreciate that tough questions are appropriate

Board Responsibilities:

- Work as problem solvers as well as governors
- Be willing to ask tough questions
- Respect the difficulty of the Executive Director's job
- Make only reasonable requests for ad hoc reports
- Give serious attention to financial reports and needs



Roles and Responsibilities





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Overview of Robert's Rules of Order



Chad Chancellor Previews The 5 Minute 8 Second Video Above

WHAT YOU WILL LEARN

- Learn which motions don't require a second.
- Learn which motions don't require debate.
- Learn which motions need a 67% vote to pass.
- Learn which motions need no vote at all.
- Learn how to appeal the ruling of the chair.
- Learn how to stop members from debating and demand the motion on the table have a vote.
- Learn how to be an effective chair.
- Learn how to limit the number of times a member can speak on a motion in order to move the meeting along in a productive manner.

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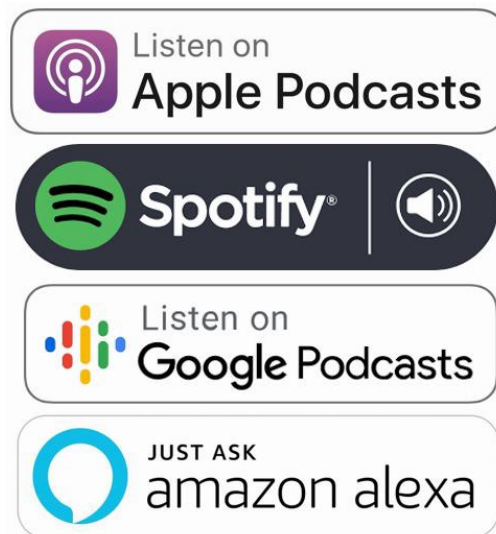
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1-800-764-3105

chad@thenextmovegroup.com

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