**258**

Prime Responsibility Chart Template

XYZ ORGANIZATION

**TOOLS & TEMPLATES**

**P =** Prime Responsibility **A =** Assistant Responsibility **AP =** Approval Required

|  |
| --- |
| **ROLES AND RESPONSIBILITIES** |
|  | **BOARD** | **Executive Director** | **VP/CFO** | **DEPT. HEADS** |
| **PERSONNEL:** |
| Hire and fire top leader | P |  |  |  |
| Hire and fire senior leaders |  | P |  |  |
| Hire and fire middle management |  | AP | P |  |
| Hire and fire staff |  |  | AP |  |
| Annual update: employee handbook | AP | A | P | A |
| **PLANNING:** |
| Mission, vision, values | A | P | S | S |
| Rolling 3-year plan annual update | A | P | S | S |
| Executive Director’s annual goals | A | P | S | S |
| Department heads annual goals |  | A | A | P |
| **FINANCE:** |
| Annual budget | A | S | P | S |
| Quarterly financial reports |  |  | P |  |
| Annual audit | A |  | P |  |
| Non-budgeted expenditures over $  |  | A | P | S |

**TOOLS & TEMPLATES**

|  |
| --- |
| **ROLES AND RESPONSIBILITIES** |
|  | **BOARD** | **Executive Director** | **VP/CFO** | **DEPT. HEADS** |
| **ADD CATEGORIES, ROLES, AND RESPONSIBILITIES AS NEEDED:** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

Only one person has prime responsibility. In the absence of a Board Policies Manual (see Tool #17), this chart clarifies board and staff roles. Update regularly (e.g., Version 3.0 – 4/15/2021).

 **259**