

Exhibit B: Executive Director Essential Functions Inventory

Executive Director Function	Possible Back-Ups
A. Board Development/Communication:	
<input type="checkbox"/> Scheduling meetings and distributing agendas and materials.	
<input type="checkbox"/> Sending out meeting notes.	
<input type="checkbox"/> Regular email and telephone communication with board members.	
<input type="checkbox"/> Reporting to the board during board meetings.	
<input type="checkbox"/> Assisting board members in identifying an Acting or Interim Director.	
<input type="checkbox"/> Other:	
B. Organization Communications/Public Relations:	
<input type="checkbox"/> Press releases.	
<input type="checkbox"/> Newsletters (print and electronic).	
<input type="checkbox"/> Notifying board members and advisory committee members.	
<input type="checkbox"/> Notifying stakeholders: funders, purchase of service payors.	
<input type="checkbox"/> Who will accept calls from outside parties who call the ED and do not know about the transition?	
<input type="checkbox"/> Who will assume responsibility for the ED's email, voicemail and snail mail?	
<input type="checkbox"/> Other:	
C. Fund Development:	
<input type="checkbox"/> Fund development planning: implementing a calendar of organization funders with timelines and tasks.	
<input type="checkbox"/> Grant writing and proposal writing.	
<input type="checkbox"/> Reporting to funders: writing, submitting, etc.	
<input type="checkbox"/> Special events planning and implementation.	
<input type="checkbox"/> Individual donor appeals.	
<input type="checkbox"/> Coordinating communication with funders on transition issues.	
<input type="checkbox"/> Other:	
D. Fiscal Oversight:	
<input type="checkbox"/> Accounts receivable and accounts payable.	
<input type="checkbox"/> Petty cash administration.	
<input type="checkbox"/> Check signing/authorizing purchases.	
<input type="checkbox"/> Organization budget oversight (monthly).	
<input type="checkbox"/> Communication with outside accountants and auditors.	
<input type="checkbox"/> Other:	
E. Personnel Management and Supervision:	
<input type="checkbox"/> Weekly communication/meetings of the management team.	
<input type="checkbox"/> Reviewing and approving payroll.	
<input type="checkbox"/> Addressing benefit questions and issues.	

Executive Director Function	Possible Back-Ups
<input type="checkbox"/> Hiring and training new staff.	
<input type="checkbox"/> Addressing employee performance problems (including termination).	
<input type="checkbox"/> Mentoring supervisory and management staff.	
<input type="checkbox"/> Coordinating communication with staff on transition issues.	
<input type="checkbox"/> Other:	
F. Compliance Mandates:	
<input type="checkbox"/> EEOC compliance: (administration and oversight).	
<input type="checkbox"/> Compliance with federal and state licenses (annual renewals, audits, etc.).	
<input type="checkbox"/> Compliance with county and city licenses: (building codes, etc.)	
<input type="checkbox"/> Other:	
G. Contract Management:	
<input type="checkbox"/> Public funding sources: federal, state, etc.	
<input type="checkbox"/> Private funding source.	
<input type="checkbox"/> Other:	
H. Vendor Oversight:	
<input type="checkbox"/> Accountants and auditors.	
<input type="checkbox"/> Grant writers.	
<input type="checkbox"/> Insurance underwriters.	
<input type="checkbox"/> Building repair and maintenance.	
<input type="checkbox"/> Security.	
<input type="checkbox"/> Other:	
I. Volunteer Coordination:	
<input type="checkbox"/> Recruiting and training.	
<input type="checkbox"/> Supervising, delegating and communicating.	
<input type="checkbox"/> Overseeing advisory committees.	
<input type="checkbox"/> Other:	