

# **THE ROLE & RESPONSIBILITIES OF A SMITH CHARITIES PRESIDENT**

## **I. Annual Meetings:**

1. Set agenda for meetings
2. Chair all meetings that occur at the annual meeting:
  - a. Trustee Meeting
  - b. Standing Electors Meeting
  - c. Incoming Electors Meeting

## **II Trustee Meetings:**

1. Chair all Trustee Meetings
2. Set agenda after collecting agenda items from Trustees and any Electors

## **III. Financial Responsibilities:**

1. Oversee implementation of grants such as the Community Preservation Act historic preservation grant
2. Implement the daily and monthly budget priorities

## **IV. Community Responsibilities:**

Promote the delivery of Smith Charities' programs (including mortgage outreach and advertising of the availability of Smith Charity gifts) through new and existing outreach and partnerships. As part of these tasks, the President will:

1. Liaise with town officials
2. Promote Smith Charities gifts and mortgages in the community
3. Liaise with Smith Vocational School

## **V. Management Responsibilities**

Provide leadership and direction to staff and ensure the continued development and management of a professional and efficient organization; establish effective decision-making processes that will enable Smith Charities to achieve its long and short-term goals and objectives. As part of these tasks, the President will:

1. Oversee daily operations of the organization and promote a positive work environment that supports consistency throughout the organization's strategy and operational methods and needs.
2. Support, motivate, and supervise staff.
3. Ensure staffing is adequate, financial records are in order, and short and long-term goals are realized. Assess and attempt to respond to staff needs and concerns.
4. Provide support and advice to staff and professional development as needed.
5. Evaluate staff annually as a collaborative process with staff providing input on their goals and needs
6. Ensure the delivery of high-quality services while managing for any necessary growth
7. Ensure compliance with all organizational policies, including revisiting Smith Charities Written Information Security Program (WISP) annually as is required by law

## **VI. Development**

Ensure that the flow of funds permits Smith Charities to make continuous progress towards the achievement of its mission and that those funds are allocated properly to reflect present needs and future potential.

Formulate and execute marketing, branding and/or development strategies that will ensure consistency throughout the organization and enhance revenue from major donors, foundations, government agencies, and corporations.

Increase efficiencies and consistency in the organization by developing and implementing standardized programs, services, and implementation of organizational operations

Consider fundraising possibilities for the organization. This could include meeting with individual donors, seeking the support of corporate sponsorship and tapping organizational constituents for individual donations.

## **VI Role vis-a-vis Trustees and Electors:**

The President will cultivate a strong and transparent working relationship with the Board of Electors and Trustees and ensure open communication about financial, programmatic, and charitable performance and goals. As part of these responsibilities, the President will:

1. Communicate with and answer questions from Trustees and Electors
2. Ensure that background materials needed to make informed decisions are provided to Trustees and Electors in advance of meetings
3. Promote engagement among the Board of Electors and Trustees to promote Smith Charities mission and to leverage community resources where feasible

## **VII. Duties in conjunction with Trustees**

The President will report to and work collaboratively with the Trustees and the Oliver Smith Electors. Specifically, she or he will ensure that Smith Charities fiscal, operations, fundraising, marketing, human resource, technology, and programmatic strategies are effectively implemented. Among these duties, the President will:

1. Oversee implementation of the annual and monthly budget expenditures
2. Oversee administration of mortgage applications and compliance with mortgage agreements
3. Communicate with and seek assistance from the accountant and attorney retained by Smith Charities as needed
4. Oversee the financial status of the organization including developing long and short range financial goals and plans; monitoring the budget and ensuring sound financial controls are in place; and setting financial priorities accurately to ensure the organization is operating in a manner that supports the needs of the program and staff.
5. Create a long-range strategic plan and short-term goals and priorities for Smith Charities while ensuring that the budget, staff, and priorities are aligned with Smith Charities' core mission.
6. Evaluate progress of the planned outcomes and connect the Long-Range Strategic Plan and short term goals to daily work keeping in mind the vision and mission of the organization.
7. Monitor the progress of any Elector/Trustee subcommittees and their alignment with organizational mission and goals.

## **Qualifications**

- Professional and/or management experience preferred but not required
- Prior experience in some capacity with the world of nonprofits preferred but not required
- A willingness to lead and the ability to set clear priorities, communicate well with staff, Elector and Trustees; manage grants; and interact with community leaders and collaborators.
- Problem solving skills and the ability to work effectively with a variety of internal and external stakeholders
- Strong commitment to the charitable mission of Smith Charities
- Willingness to oversee and work collaboratively with staff
- Willingness to think about issues of diversity and how Smith Charities can promote greater access to its gifts and mortgages among a diverse population in the community