



## **Executive Portfolios**

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### **1. Why do organisations need executive portfolios**

Organisations differ in its membership size but each organisation needs a group of people that will be given a mandate to lead, guide, protect and build that organisation.

Since organisations may have anything from twenty to a thousand members, these members cannot all meet to make decisions and have detailed discussions. You need to have certain (elected) members who will be tasked to perform a leadership role and will do specific things that will take the organisation forward.

You also need some people who will do more work and take more responsibility than the average member.

Most organisations are made up of volunteers and it is sometimes difficult to get people to take responsibility for work. Elected leaders are usually also volunteers, but they have to be more accountable than ordinary members since they have been elected to perform a specific role.

Your constitution should spell out the role, powers and responsibilities of each executive member. Executive members should take their responsibilities seriously and should be called to account if they fail to fulfil their tasks.

## **2. Important things to know about executives**

Organisations use different methods to select or elect people to executive and this method or process is usually clearly stated in each organisation's constitution. Usually the elections take place at the organisation's Annual General Meeting and all members have the right to vote.

It is important to make sure that the portfolios on you executive correspond with the work that your organisation needs to do. Most organisations (big or small) have what is usually called the "top five ". This refers to five people elected into executive leadership of that organisation who are:

1. The chairperson
2. The secretary
3. The treasurer
4. The Deputy chairperson
5. The Deputy / vice secretary.

The above are complimented by additional executive members who are given other portfolios in terms of the organisation's constitution. Examples of the kind of portfolios you may need are:

- Media officer
- Organiser
- Project officer
- Campaigns Co-ordinator

- Training officer
- Membership / Recruitment officer
- Fund- Raising Co-ordinator

The process or method used to choose or elect members into such portfolios differs from organisation to organisation. In most organisations the top five are elected individually by all members at the AGM. The additional members are then elected and only allocated to portfolios at the first executive meeting.

Each portfolio should have clear functions/tasks to perform to avoid tensions within the leadership especially where certain tasks overlap. Each Portfolio should have performance indicators that will help the organisation to monitor the performance of each person in relation to his/ her own portfolios.

### **3. How to run an executive**

#### **A. The role of the executive**

The executive as a collective group has three main roles:

1. To provide leadership and direction
2. To represent the organisation in public and elsewhere
3. To manage the work and administer the affairs of the organisation

#### **1: Leadership and direction**

Leaders are elected because members trust them to lead the way. Leaders can have many qualities and any one person will not have all of them. A good leader may be experienced, committed, inspiring, energetic, authoritative or easy to talk to. A leader in the army will need different qualities from a leader of a community organisation.

Community leaders should try to lead in a way that makes members feel more powerful. People should feel that they themselves have achieved something when the organisation succeeds. Leaders should inspire and empower members, and should never dominate and dictate.

Leaders also have to behave better than anyone else and set an example to members. Here are some simple rules that will help you become a better leader:

- Always uphold the public image of your organisation and know your organisation's policies
- Treat all people with warmth and respect and listen to their views
- Encourage participation and praise or thank people for the work they do
- Be honest, behave with integrity and fight against all corruption
- Always account properly for any of the organisation's money
- Be accountable to your members and act with the mandate they give you - you should represent their views, not be their prophet who tells them what they think
- Discourage gossip, rumours and destructive behaviour
- Avoid getting involved in factions, cliques and conflicts
- Be punctual and reliable and do not make any false promises - if you are unable to attend an event or fulfil a task, apologise and explain
- Respect the people who lead your executive, but do not be afraid to question leaders
- Never take for granted the support you have from members or from the public
- When faced with a difficult decision, always put the interests of the community first, then the interests of your organisation and only then the interests of an individual leader or member.

To provide direction and leadership to an organisation, the executive should be very clear about their goals and strategies and the work the organisation needs to do. They should make sure that members understand the strategies and are involved in work. Some of the things they should do are:

- Analyse the environment they work in on an ongoing basis
- Do proper strategic planning at least once a year [see planning guide]
- Have regular reviews of how the organisation is doing in terms of its plan
- Monitor and manage the work of the organisation to make sure there is progress and problems are dealt with

- Motivate members to become more active and to participate in activities as well as discussion and debate
- Make sure members have information on relevant issues affecting the organisation.
- Structure meetings in such a way that members can openly and frankly debate and decide on various issues related to the organisation. [[see meeting guide](#)]
- Give opinions without stifling debates. Opinions from leadership should not suppress other member's views.

## **2. To represent the organisation in public and elsewhere**

Members of the executive are usually the ones who will publically represent the organisation. The organisation should be very clear about who represents them where and with what mandate. Leaders should not speak on behalf of the organisation if the organisation has not agreed on broad policies or positions on an issue.

Before representing you organisation in public, try to find out what will be expected of you and what your organisation's position is on any relevant issues. Executive members will be asked to represent their organisations in the following types of situations:

- Addressing the public on an issue
- Negotiating with authorities
- Representing the organisation at meetings with other organisation.
- Representing the organisation on joint committees.
- Representation at formal occasions e.g. lunches, functions etc.
- Speaking on behalf of the organisation at functions/meetings the organisation is invited to.
- Representing the organisation when dealing with the media.

## **3. To manage the work and administer the affairs of the organisation**

A large part of the work of any executive is administrative and managerial. You are responsible for the smooth running of the organisation. If you employ people

or deal with lots of money, this can get quite complicated. In organisations that employ people, some of the work of the elected secretary is usually done by an employed administrator. The elected treasurer is sometimes assisted by a bookkeeper.

For small organisations with no staff, the following administrative work has to be done:

- Setting up and maintaining a filing system [See [guide on Filing](#)]
- Typing
- Answering the telephone
- Dealing with correspondence
- Writing and processing reports
- Communicating with your national office or other organisations
- Keeping membership records
- Keeping a mailing list
- Keeping the minutes of meetings of the executive and the general membership
- Put up notices of the meetings and issue out invitations
- Keeping good financial records. [see guide on Accounting]

## **B. Role and tasks of the Chairperson**

The role of the chairperson is to chair meetings and act as the public leader of the organisation. In most organisations the chairperson performs the following tasks:

- Convenes and chair meetings of the Executive Committee. [see [guide on meeting skills](#)]
- Chairs the general meetings of the membership.
- Speaks at other meetings and events on behalf of the organisation.
- Represents the organisation on other structures and with other organisations, authorities, funders and the public.

- Deals with the media in liaison with media or publicity officer [if you have one]
- Deals with disciplinary issues and problems members may have with the organisation.
- Spends time on strategising and planning as well as monitoring progress of the organisation.

The deputy chair has the same role and plays it when the chair is not available. It is good to give the deputy chair some specific responsibilities so that person remains active and stimulated. The deputy chair could for example be responsible for sub-committees on projects, or could represent the organisation on the development forum.

### **C. The role and tasks of the secretary**

In many organisations the role of the secretary is to act as an administrator. In some bigger organisations like unions and political parties, the secretary acts more like a manager than an administrator. In terms of administering an organisation the secretary is usually responsible for the following tasks:

- Letting people know about meetings
- Drawing up agendas for meetings. [ See [guide on meeting skills](#)]
- Taking minutes of the Executive meetings and of the general meetings.
- Following up all tasks and decisions that come out of meetings to make sure they are implemented
- Writing organisational reports
- Keeping membership records.
- Receiving and responding to correspondence
- Keeping all records and a good filing system.[see Filing Guide]
- Dealing with incoming calls (telephones) and placing adverts in newspapers.
- Manage the office if you have one

The deputy secretary will assist the secretary and take over any functions as needed.

## **D: Treasurer**

The treasurer is responsible for managing the money of the organisation. S/he has to account for all funds raised and spent on a monthly and annual basis. In bigger organisations the treasurer is sometimes assisted by a bookkeeper. The tasks of the treasurer include:

- Opening bank accounts
- Keeping the cheque book
- Drawing up a budget
- Keeping record of incoming and outgoing finances.
- Issuing receipts for money received.
- Paying all the bills for the organisation within the budget
- Keeping both the Executive and membership up to date about the financial status of the organisation.
- Making sure that the organisation is audited and the annual financial reports are done and presented to the AGM

For more detail on financial management see the guide on Accounting and the guide on [Budgeting](#).