

BOARD VERSUS STAFF ROLES IN FUNDRAISING

INSTRUCTIONS: For each of the following tasks related to fundraising, indicate who within your organization has primary responsibility: the Board or the staff, or whether the responsibility is *shared*. Once you have completed the first column, discuss with your group who **should have** primary responsibility for the tasks listed.
 B = Board S = staff J = joint/shared

	Responsible Now	Should be responsible
1. To establish fundraising objectives.	_____	_____
2. To develop an annual fundraising plan for the organization.	_____	_____
3. To make an annual contribution to the organization.	_____	_____
4. To identify potential funders.	_____	_____
5. To research potential funders primarily through guides or other written materials.	_____	_____
6. To identify contacts within targeted potential funders.	_____	_____
7. To prepare proposals and other fundraising materials.	_____	_____
8. To use contacts to "get in the door" with potential funders.	_____	_____
9. To make solicitation visits.	_____	_____
10. To do follow-up to solicitation visits.	_____	_____
11. To keep records on the fundraising process.	_____	_____
12. To do outreach/marketing for special events.	_____	_____
13. To handle logistics for special events.	_____	_____
14. To maintain ongoing contact with funders.	_____	_____
15. To sign solicitation letters or letters accompanying proposals.	_____	_____