

## Board and Staff Roles in Fundraising

### Fundraising Task Matrix

Fundraising Task	Board, Staff or Joint Responsibility
Make annual gift to organization	
Acknowledge gifts (letters, receipts, etc.)	
Develop annual fundraising plan	
Approve fundraising plan	
Oversee implementation of fundraising plan	
Prepare proposals (grants, etc.)	
Identify potential funders and supporters	
Fundraising record keeping	
Provide introduction to potential supporters	
Network and promote the organization	
Research potential funders	
Prepare fundraising materials (brochures, etc.)	
Visit potential donors and current donors	
Ask donors for gifts	
Follow up after the ask	
Update donors regarding impact of their gift	
Map personal and professional connections to prospects	
Build connections to prospects where none exist presently	
Thank donors and supporters	
Provide access to personal and professional contacts	
Invite potential and current supporters to events	
Lead facility tours for potential and current supporters	
Serve as greeters/information source during events	

### Discussion Questions

- For staff responsibilities:
  - What, if any, support is needed (training, systems, etc.)?
  - Do any job descriptions need to be updated?
  
- For board responsibilities:
  - What, if any, support is needed (training, systems, etc.)?
  - Who will hold board members accountable for completion of task?
  - How will we communicate these expectations to prospective board members?
  - Do any documents (bylaws, board job descriptions, etc) need to be updated?