

# Appendix 9-C

## Key Roles in Fund Development

### Role of the Board

The board is legally and morally accountable (i.e., liable!) for the health of the organization. A key accountability is to assure fiscal health. The board cannot delegate its accountability to any other entity, staff, or committee.

1. Define organizational direction and purposes for securing charitable contributions.
2. Set short- and long-term goals. Adopt the fund development plan to meet these goals. (The strategic fund development plan is adopted at the time of budget adoption. It's an advantage to assign board member accountabilities in the plan prior to adoption.)
3. Set policies related to fund development, including recognition and gift acceptance.
4. Review results and talk about progress, trends, and implications.
5. Identify and talk about internal strengths and weaknesses and external opportunities and threats.

### Role of the Individual Board Member

The individual board member serves as part of the group that is the board. As an individual within the group, each board member must participate in discussion and decision-making within the areas of governance. As an individual volunteer, each board member must help with relationship building and fund development in some manner.

1. Commit to and carry out specific activities in the fund development plan—and be accountable for what you said you would do.
2. Identify and cultivate the predisposed.
3. Nurture relationships with donors and prospects.
4. Help solicit as appropriate.
5. Watch what is happening at your organization and in the community. Share your observations, ask questions, and help the organization wrestle with issues and make good decisions.
6. Give your own personal gift—to the best of personal ability—at the start of each year's fund development program. If the organization is conducting a capital campaign, give a gift to that campaign also.

## **Role of the Fund Development Committee**

In summary, the development committee is responsible (along with staff) for institutionalizing the process of fund development within the board. The development committee functions as a group. Its individual members have responsibilities outside of committee operations (e.g., give an individual gift and help carry out specific tasks).

In summary:

1. Review results and talk about progress, trends, and implications.
2. Identify strategic issues for board conversation, learning, and sometimes (but not always) action. Facilitate board discussion and decision-making.
3. Identify and talk about internal strengths and weaknesses and external opportunities and threats.
4. As appropriate, recommend action for board adoption. Or present well-thought-out alternatives for board conversation and action.
5. Propose goals and directions throughout the year (while implementing current plan) to include in subsequent year's fund development plan.
6. Through the fund development planning process, test proposed goals, adjust, and refer to staff and finance committee.
7. Review staff-drafted plan and recommend to board for conversation and action. Recruit every board member to participate in the plan in some way.

## **Role of the Staff**

(See job description of chief development officer, Appendix 4-A on this website.)

1. Ensure that the organization is donor-centered, operating in a culture of philanthropy.
2. Lead and enable the volunteers. See Chapter 5 on leadership and Chapter 8 on enabling, both in *Strategic Fund Development*, 3rd edition.
3. Be familiar with and understand the body of knowledge and best practice in fund development. Educate and guide the board accordingly.
4. Manage and coordinate all fund development activities.
5. Develop and maintain gift management systems, acknowledgment and recognition, and so on.
6. Develop progress reports; analyze trends and implications. Assure that the development committee and board have adequate, appropriate, and timely information to make quality decisions.
7. Draft materials and provide resources for the fund development process. Provide training and coaching for volunteers.
8. Review results; analyze progress, trends, and implications.
9. Identify strategic issues for committee and board action. Facilitate board conversation and decision-making. As appropriate, recommend action for board adoption—or present well thought out alternatives for board conversation and action.
10. Identify and discuss internal strengths and weaknesses, external opportunities and threats.
11. Propose goals and directions throughout the year (while implementing current plan) to include in subsequent year's plan.
12. Through the fund development planning process, test proposed goals and refer to finance committee for budget adjustment.
13. Draft plans for review by appropriate individuals and groups.
14. Chief development officer and chief executive officer are also expected to give an annual gift to the best of personal ability, and to give to any capital campaign.