

Roles in Fundraising: Teamwork

*A good fundraising program has two kinds of leadership –
the layman who leads and the staff person who manages and serves.
The better each is, and the better they work together, the better the results will be.
~ Seymour, 1966*

Teamwork

Fundraising can't be a priority for just one individual. It has to be a primary and a shared responsibility, for the board, the executive director and the staff alike.

Role of staff

Fundraising is 90% homework and 10% solicitation. The role of the staff is to do the homework—with the Board's help. The role of the Board is to do the solicitation—with the staff's support.

- Sets annual fundraising goals (with Board approval)
- Keeps fundraising plan on track
- Collects, organizes and produces “tool kit” needed for cultivation and solicitation
- Coordinates and executes events, mailings, grantwriting, etc.
- Sets appointments for gift solicitations and shares in the responsibility with the Board in soliciting donations
- Give the Board specific ideas and strategies to help raise money
- Keeps the database information on donors and prospects up to date
- In summary, the staff is the glue that holds the fundraising effort together, setting up the meetings, gathering the information, educating the volunteers and saying thank you.

Role of Board

The Board members are the community volunteers who say: “The work of this organization is important. Please join me in supporting it to enrich the lives of our children and the quality of life in our community!”

To raise funds, you need time, talent and treasures from your Board and other volunteer leadership. This does not mean that every Board member should have wealth and political clout...but every Board member needs to be committed to cultivate potential contributors throughout the community, including those who have wealth and power.

Three Levels of Involvement for a Board

- **Level 1: Build the Foundation for Fundraising.**

Level One demands little personal risk. This most basic level involves activities the Board accomplishes as a group such as setting strategic fundraising goals and deciding priorities. Level One activities are basic to the process and without them donor cultivation and solicitation is not always successful.

- **Level 2: Gathering Momentum Through “Friend Raising”.**

Level Two outlines numerous ways board members can support prospect cultivation and outreach. For some Board members, Level Two activities will stretch both their vision and capabilities, making their service more productive. This is where Board members become active in “friend raising”. Board members help donors and prospects learn more about the organization as they share their conviction about its mission and services.

- **Level 3: Commitment and Solicitation**

Level Three focuses on the sensitive topics of personal giving and asking others for monetary gifts. Focused relationship building, as a prelude to making “the ask”, is an important part of Level Three’s action guidelines. At this level, Board members will be asking others to share their time, talent and treasure – or work, wisdom and wealth – which are all needed for effective fundraising. Board members should think of each one-on-one solicitation as a continuation of their training. Even unsuccessful solicitations can be useful if the Board member uses this as an opportunity to fine tune their approach.