Recommended Checklist of Fund Development Responsibilities

for the Board of Trustees, Development Committee, School Leadership Team and Development Leader/Dept

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| **Development Responsibilities** | **Full Board of Trustees** | **Development Committee** | **School Leadership Team** | **Chief Development Officer** |

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| Development policies & procedure manual |  | Review critical policies and vote upon |  | Develop, update, review, provide feedback policies |  | Understand, enforce & follow procedures |  | Establish, document, enforce & follow internal controls in manual |  |
| Applying to and receiving Grants |  | Receive updates on opportunities |  | Receive updates on opportunities |  | Apply grants to appropriate programs |  | Identify grants and send applications/manage process |  |
| Annual and multi-year fundraising plans as part of full board planning and Goal setting process |  | Vote upon recommended plans and goals |  | Develop Annual and multi-year fundraising goals and opportunities |  | Identify $ need and fundraising budget |  | Develop detailed plans and execute  Develop and provide collateral to share with team as needed |  |
| Fundraising events and activities (as part of the annual fundraising plan) |  | Attend events and market/network as required or promised |  | Recommend expectations for board and their network, ensure board promises are upheld and $ goal secured |  | Coordinate the implementation of the fundraising plan with fundraising efforts by senior staff, parents, and other volunteers. |  | Develop detailed plan, reach out to vendors, secure partnerships and supervise execution of event |  |
| Community engagement |  | Attend events and market/network as required or promised |  | Identify need gaps in community relationships and provide outreach and networks as needed |  | Coordinate the implementation of the community engagement plan with efforts by senior staff, parents, and other volunteers. |  | Develop community engagement event plans and communicate with vendors for monetary or in-kind donations |  |
| Development training – Professional development |  | Attend board trainings for development |  | Arrange for Board training on development issues |  | Support in researching and planning develop trainings for the board with proper materials |  | Support leadership team in executing training opportunities |  |
| Capital Campaigns |  | Provide oversight and innovation toward reaching campaign goals |  | Work with leadership to identify board’s role and resource need to successfully reach campaign goal (personal or professional networks for partnerships, etc.) |  | Identify capital campaign mission and develop multi-year plan for execution |  | Support leadership team’s efforts to widen networks and secure $ and track progress |  |
| Endowment development/establishment oversight |  | Oversee endowment growth |  | Support leadership team in developing board plan for contribution and oversight |  | Develop endowment fund and campaigns for growth. |  | Provide collateral, mission, marketing and growth plan to invite community donors |  |