



TOOL | Fundraising Roles for Success

TIME REQUIRED: 30 minutes to prepare and ongoing use after set-up.

Strategic resource development takes significant amounts of time and requires capacity building within organizations and collaboratives. Understanding the roles that each member of your team plays in fundraising can help to reduce redundancy, provide people with ownership of their role, and clarify organizational capacity.

USING THIS TOOL WILL HELP YOU:

- Understand the necessary roles in fundraising
- Prepare your team to establish and clarify roles
- Write role descriptions for your team

OVERVIEW

Role clarity in fundraising makes it easier for team members to engage with your fundraising campaign and makes it easier for external partners to become friends and resource mobilizers for your collaborative. Setting fundraising roles that reflect organizational capacity and assets helps to build strong, authentic relationships with funders, and ensures that communication for your fundraising campaign is consistent. This tool is best implemented at the beginning of the planning phase of fundraising.

USING THE TOOL

The Fundraising Roles for Success tool is meant to prepare your collaborative to develop a fundraising team that engages across organizations and volunteers. The first section outlines responsibilities across the collaborative and the second section provides potential roles for a fundraising committee or action team that can be shaped into terms of references and duties for team members.

Fundraising is ultimately about developing and building relationships. Role clarity will help to build internal buy-in for your efforts and help you engage your team and volunteers.

Fundraising Responsibilities in a Collaborative

Fundraising and resource mobilization to support collaborative efforts are resource and time intensive. Fortunately, role clarity can help to streamline fundraising efforts and help to grow and diversify funds for your cause.

Action Team (Co)-Chair

Action team co-chairs are in a unique position to speak for your action teams. Depending on their level of comfort, they can be externally communicating your action team's vision to the community and talking with major donors, individuals, and foundations.

Action Team

Action team members have relationships and networks that can be important for friendraising. Action team members should consider individuals and organizations that could be prospected both for funds and potential introductions to new friends.

All action team members should know the elevator pitch for your team and the top priorities for the collaborative. It is especially valuable if action team members can provide the elevator pitch for other action teams of the collaborative.

Volunteers and Fans

You have a community of fans and volunteers that believe in your work. It is an important part of your success and ongoing efforts. You can look to these fans and volunteers as part of your community organizing and resource mobilization efforts by inviting them into your fundraising strategy. As an example, the John Howard Society's fund development committee includes members of the community it serves as formal members.

Fundraising Committee Roles

Fundraising committees can be housed inside of the leadership of an Action Team, but it is important to be clear about the roles that are being played and to take the needed space and time to properly plan and implement fundraising strategies. Below is an outline of general and specific roles for the fundraising team to ensure success.

General

- Set the overall strategy for the campaign & agree on individual roles / responsibilities
- Develop a campaign calendar for fundraising activities (critical dates, milestones etc)
- Participate in special events and fundraising activities
- Participate in friendraising prospecting, cultivation and stewardship where they have relationships and expertise as requested by the fundraising chair
- Work with existing relationships and networks for potential friends, time, money and in-kind support
- Monitor fundraising efforts to ensure reflecting strategy and principles

Campaign Chair

- Responsible for creating & executing fundraising plan
- Main spokesperson when interacting with external groups
- Lead donor stewardship communications (emails, phone calls, in-person meetings)
- Develop and maintain ongoing relationships (including identification, cultivation, and solicitation)
- Coordinate grant writing
- Coordinate stewardship plan for donors

Prospect Coordinator

- Coordinate team to identify potential friends and granting prospects
- Research and identify sources of funding and friends (grants, corporate sponsors, individual, foundations etc)
- Assist campaign chair to prepare for meetings
- Ensure donor data is properly tracked (contact info, meeting notes, information relevant to “making the ask”)
- Develop and track proposals & reports for potential friends
- Lead gift processing and management

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Tamarack Workbook – [Friendraising: Raising Funds, Finding Friends to realize a Bold Community Vision](#)

Tamarack Tool – [Friendraising: From Raising Funds to Making Friends](#)

John Howard Society – [Fund Development Committee Terms of Reference](#)