Development Structural Self-Assessment

*Who does this today?*

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| Task | CEO/ED | Board of Directors | Staff |
| Setting goals and objectives for raising funds that support the organization’s vision, mission, and strategic plan |  |  |  |
| Ensures the board’s legal responsibilities are met |  |  |  |
| Ensures the organization’s fiscal integrity and financial health |  |  |  |
| Oversees and/or manages prospect and donor research |  |  |  |
| Prepares the overall development plan in concert with organizational plans |  |  |  |
| Primary external spokesperson for the organization, conveying its mission/vision enthusiastically and consistently |  |  |  |
| Monitors program activity to ensure progress is being made towards strategic plan goals, objectives and strategies/action plans |  |  |  |
| Manages preparation and submission of fundraising reports to the board and legal/regulatory entities |  |  |  |
| Responsible for starting initial conversations with donors |  |  |  |
| Establishes investment policies and guidelines: (how funds are invested/spent) |  |  |  |
| Provides appropriate recognition to volunteers, and ensures others provide it |  |  |  |
| Provides operations oversight (use of legal counsel, use of consultants and outside experts) |  |  |  |
| Establishes and maintains appropriate records as well as gift and reporting processes/procedures |  |  |  |
| Responsible for requesting gifts |  |  |  |
| Delineates gift acceptance policies: (types of giving instruments to be offered, who is authorized to negotiate for gifts, who ensures all tax authority requirements are met) |  |  |  |
| Defines the roles of the board and of committees such as development, planned gifts, and investment |  |  |  |
| Legally and morally accountable to stakeholders, including the public-at-large, for the actions of the organization |  |  |  |
| Maintains awareness of potential conflicts of interest and ethically insures involving the organization’s activities |  |  |  |
| Responsible for day to day operations of the organization |  |  |  |
| Ensures appropriate and adequate safeguards are in place to maintain confidential information |  |  |  |
| Ensures appropriate records management and reporting procedures are established and maintained |  |  |  |
| Responsible for identifying prospects |  |  |  |
| Develops, motivates, trains, and retains development department staff (either hands-on or by ensuring it happens) |  |  |  |
| Facilitates/mediates difficulties between volunteers and between staff |  |  |  |
| Creating operational systems for gift processing, tracking results, and forecasting fundraising |  |  |  |

*Who should do this?*

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| --- | --- | --- | --- |
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