

Fund Raising Work Plan

From *The Grass Roots Fundraising Book* by Joan Flannagan

Small Volunteer Group	Large Organization With Paid Staff
<p>Officers and Members of The Board</p> <ol style="list-style-type: none"> 1. Plan programs 2. Make budget 3. Make fund raising strategy 4. Give money first 5. Sell memberships and ask for money 6. Review and revise fund raising strategy every three months. 	<p>Officers and Members of The Board</p> <ol style="list-style-type: none"> 1. Plan programs 2. Make budget 3. Make fund raising strategy 4. Take personal quotas 5. Give money to organization 6. Ask for money from individuals, businesses, churches and others 7. Review and revise budget & fund raising strategy every three months. 8. Evaluate program, budget & fund raising once each year. <p>If you hire paid staff the Board will</p> <ol style="list-style-type: none"> 1. Hire and train the staff 2. Supervise the staff. Assign as needed to achieve goals 3. Evaluate staff once each year
<p>President</p> <ol style="list-style-type: none"> 1. Leads fund raising 2. Asks for money first and most often 3. Recruits and inspires other fund raisers 4. Can cosign checks 	<p>President</p> <ol style="list-style-type: none"> 1. Recruits & inspires Board members 2. Sets pace for fund raising, sells first and most 3. Leads major donor campaign 4. Leads corporate campaign 5. Can cosign checks
<p>Treasurer</p> <ol style="list-style-type: none"> 1. Prepare monthly reports on income & expenses for Board meetings. 2. Prepare quarterly reports comparing to budget for finance meetings. 3. Prepare annual reports for IRS, etc with help of volunteer CPA 4. Supervise annual audit. 5. Liaison with bank & investment institution. 6. Pay bills and write checks. 7. Deposit money 8. Maintain journals, ledgers, files 9. Maintain petty cash 10. Can cosign checks (another officer should reconcile bank statement) 	<p>Treasurer</p> <ol style="list-style-type: none"> 1. Prepare monthly reports on income & expenses for Board meetings. 2. Prepare quarterly reports comparing to budget for finance meetings. 3. Supervise annual audit. 4. Prepare annual reports for IRS, etc with help of volunteer CPA 5. Liaison with bank & investment institution.. 6. Can cosign checks <p>Treasurer may do or supervise</p> <ol style="list-style-type: none"> 1. Pay bills and write checks. 2. Calculate & write payroll checks & deductions. Deposit payroll taxes on time. 3. Make deposits. 4. Maintain journals & ledgers 5. Maintain petty cash system

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<p>Secretary</p> <ol style="list-style-type: none"> 1. Takes minutes at meetings 2. Maintains mailing lists. Recruits & trains mailing committee. 3. Maintains donor cards 4. Maintains files – corporate records, correspondence, historical samples, fund raising records. 5. Liaison with post office. 6. Can cosign checks 	<p>Secretary</p> <ol style="list-style-type: none"> 1. Takes minutes at meetings 2. Maintains mailing lists. Recruits & trains mailing committee. 3. Maintains donor cards 4. Maintains files – corporate records, correspondence, historical samples, fund raising records. 5. Liaison with post office. 6. Liaison with other organizations 7. Can cosign checks
<p>Large Organization With Paid Staff (continued)</p>	<p>Membership Committee Chair</p> <ol style="list-style-type: none"> 1. Leads membership campaign 2. Recruits and inspires membership committee 3. Prepares membership brochure and other materials 4. Organizes annual membership drive and year round membership sales at meetings, parties and activities 5. Puts on victory celebration after annual membership drive 6. Sponsors “just fun” events for new members – summer picnic, winter potluck 7. Maintains inventory & keeps record of membership supplies 8. Organizes salespeople to sell T shirts, hats, bumper stickers, etc 9. Recruits and trains committee to handle renewals
<p>Paid staff should</p> <ol style="list-style-type: none"> 1. Help with record keeping and list maintenance 2. Help produce materials for fund raising campaigns 3. Train leaders and members to ask for money 4. Do work to enable organization to achieve its goals 	<p>Publicity Chair</p> <ol style="list-style-type: none"> 1. Recruits and inspires publicity committee 2. Takes leadership for radio, TV, newspaper, magazine features 3. Liaison with working press 4. Maintain list of local, state & national working press 5. Maintains current file of resumes and black and white photos of Board & speakers 6. Maintains clippings file about organization – radio, TV, news, magazines
<p>Paid staff should not</p> <ol style="list-style-type: none"> 1. Serve on the Board 2. Sign checks 3. Take a major role in asking for money. Should train others. 	<p>Possible Separate Committees</p> <ol style="list-style-type: none"> 1. Newsletter – publish & mail. Subscriber/not member list. 2. Speakers bureau – sell speakers to speak in public 3. Slide show – create and rent slide show
	<p>Co-Chairs for Fund Raising Campaign, Major Donors, Special Events</p> <ol style="list-style-type: none"> 1. Plan campaign or event – divide tasks, make timetable, set deadlines 2. Recruit & inspire volunteers – train & support new, encourage & improve veteran 3. Meetings to make decisions and do work 4. Prepare written records of campaign or event 5. Send thank you notes – workers, donors, volunteers