

**Interactivity 2023**  
**CEO/CDO Partnerships That Supercharge Fundraising**

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**A Tactical Framework for Assessing Roles and Responsibilities**

	All responsibilities	CEO/ED	CDO/DOD
STRATEGY and GOAL-SETTING	<ul style="list-style-type: none"> <li>• Provides vision and direction for the museum</li> <li>• Provides financial strategy and oversight for the museum</li> <li>• Oversight of Development Committee</li> <li>• Sets fundraising goals</li> <li>• Designs Development strategy</li> </ul>		
INDIVIDUAL & CORPORATE PROSPECT IDENTIFICATION	<ul style="list-style-type: none"> <li>• Identifying and qualifying prospective donors</li> <li>• Prospect research</li> </ul>		
GRANT IDENTIFICATION & MANAGEMENT	<ul style="list-style-type: none"> <li>• Identifying potential grants</li> <li>• Conducting grant research (potential \$ amounts, organizations funded, giving priorities)</li> <li>• Grant application strategy</li> <li>• Analyze and assess how grant can help organization meet strategic plan goals</li> <li>• Engaging staff in completion of grant-funded initiatives</li> <li>• Participation in meetings with grantors</li> </ul>		
PROSPECT & DONOR ENGAGEMENT	<ul style="list-style-type: none"> <li>• Engagement strategy and meetings</li> <li>• United front for staff in presenting funding priorities</li> <li>• Engage staff to build a strong case for support</li> </ul>		
EVENTS	<ul style="list-style-type: none"> <li>• Event strategy</li> <li>• Event design</li> <li>• Event implementation</li> <li>• Roles during events</li> </ul>		
INDIVIDUAL & CORPORATE SOLICITATION, NEGOTIATION, STEWARDSHIP	<ul style="list-style-type: none"> <li>• Initiating donor meetings</li> <li>• Briefing/prep</li> <li>• Participating in meetings/roles during meetings</li> </ul>		