

**EXHIBIT 6.3****Tasks by Area of Responsibility****Board Chair**

Ref. #	Task Detail	Responsibility of	Timeline		Status
			Start Date	End Date	
1.2.1	Appoint board appeal committee	BC ED	1/8/2002	1/30/2002	Completed
1.2.3	Send board appeal letter	CV BC	2/8/2002	2/10/2002	Completed

**Board of Directors**

Ref. #	Task Detail	Responsibility of	Timeline		Status
			Start Date	End Date	
3.1.1	Endorse development plan	BD	1/28/2002	1/28/2002	Completed
1.5.2	Recruit committee to plan event	DD BD	2/1/2002	2/15/2002	
4.1.7	Conduct final interviews for CDO	RDT BD	3/1/2002	3/31/2002	
2.1.1	Develop prospect list for business leaders breakfast	RDT BD	3/1/2002	4/30/2002	
4.3.3	Develop a list of potential development committee members	CDO DD BD	3/1/2002	4/30/2002	
3.1.2	Develop and implement awareness survey	BD	3/1/2002	5/31/2002	
3.2.3	Approve board expectations	BD	3/25/2002	3/25/2002	

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## Implementing the Plan

Ref. #	Task Detail	Responsibility of	Timeline		Status
			Start Date	End Date	
1.1.5	Endorse case for support	BD	3/25/2002	3/25/2002	
1.3.3	Recruit volunteers to help with major-gift appeal	BD	4/1/2002	5/1/2002	
4.3.4	Invite potential development Committee members to an orientation meeting	CDO DD BD	5/1/2002	5/30/2002	
3.1.3	Evaluate awareness survey	BD RDT	6/1/2002	6/30/2002	
4.3.5	Recruit development committee members	CDO DD BD	6/1/2002	6/30/2002	
2.1.3	Invite prospective business leaders to first business leaders breakfast	DD BD	6/15/2002	7/1/2002	
1.3.7	Solicit major gifts	BD VL	6/15/2002	9/30/2002	
2.1.4	Hold first business leaders breakfast	RDT BD	7/1/2002	7/31/2002	
3.1.5	Identify tag line for public awareness	BD RDT	8/1/2002	8/30/2002	
3.1.4	Evaluate success of cultivation events in raising awareness	BD RDT	8/1/2002	8/31/2002	
2.4.3	Recruit speakers for speakers' bureau	RDT BD	8/1/2002	8/31/2002	
2.1.5	Evaluate results of first business leaders breakfast	RDT BD	8/1/2002	8/31/2002	
2.1.6	Continue to hold business leaders breakfasts monthly or quarterly	RDT BD	9/1/2002		Ongoing

Summary

<b>Board Appeal Committee</b>					
<b>Ref. #</b>	<b>Task Detail</b>	<b>Responsibility of</b>	<b>Timeline</b>		<b>Status</b>
			<b>Start Date</b>	<b>End Date</b>	
1.2.2	Conduct board screening session	CV BAC	2/7/2002	2/7/2002	Completed
1.2.4	Conduct board solicitations	BAC	2/10/2002	3/25/2002	
<b>Development Consulting Firm</b>					
<b>Ref. #</b>	<b>Task Detail</b>	<b>Responsibility of</b>	<b>Timeline</b>		<b>Status</b>
			<b>Start Date</b>	<b>End Date</b>	
1.1.1	Review current case for support	CV	12/1/2001	12/15/2001	Completed
4.1.1	Develop position description for CDO	CV	12/1/2001	12/31/2001	Completed
3.2.1	Review current board expectations	CV	12/1/2001	12/31/2001	Completed
4.1.3	Place ads for CDO position	CV	1/2/2002	1/7/2002	Completed
3.2.2	Prepare proposed board expectations	CV	1/10/2002	1/31/2002	Completed
4.1.4	Receive and screen applicants for CDO position	CV	1/10/2002	2/10/2002	Completed
1.4.1	Develop proposed membership levels	CV	2/1/2002	2/6/2002	Completed
1.2.2	Conduct board screening session	CV BAC	2/7/2002	2/7/2002	Completed
1.2.3	Send board appeal letter	CV BC	2/8/2002	2/10/2002	Completed
1.1.4	Finalize case for support	DPR CV	2/8/2002	3/15/2002	Completed
4.1.5	Conduct initial interviews for CDO applicants	CV	2/10/2002	2/20/2002	Completed

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Ref. #	Task Detail	Responsibility of	Timeline		Status
			Start Date	End Date	
4.1.6	Make initial recommendations for CDO to board	CV	2/20/2002	2/28/2002	Completed
4.3.2	Develop a position description for development committee	CV	3/1/2002	3/20/2002	
1.1.6	Prepare appropriate materials from case	DPR CV	3/15/2002	4/30/2002	
2.5.2	Investigate cost and benefits of organizations	CV DPR	4/1/2002	4/30/2002	
1.3.4	Conduct screening meeting	CV	4/1/2002	5/15/2002	
1.4.2	Segment donor/prospect lists to determine approach for various prospects	DD CV	5/1/2002	5/31/2002	
2.3.2	Design publicity materials	DPR CV	5/1/2002	6/30/2002	
1.3.6	Conduct board training meeting	CV	6/1/2002	6/15/2002	
1.4.7	Prepare phonathon materials	DD DPR CV	8/1/2002	8/15/2002	
2.4.4	Prepare a letter and flyer to be mailed to organizations	CV DPR	8/1/2002	8/31/2002	
1.4.9	Conduct phonathon	DD CV	8/15/2002	8/31/2002	
2.4.6	Hold training meeting for speakers	CV DPR	9/1/2002	9/15/2002	

**Chief Development Officer**

Ref. #	Task Detail	Responsibility of	Timeline		Status
			Start Date	End Date	
4.3.3	Develop a list of potential development committee members	CDO DD BD	3/1/2002	4/30/2002	
4.3.4	Invite potential development committee members to an orientation meeting	CDO DD BD	5/1/2002	5/30/2002	

Summary

Ref. #	Task Detail	Responsibility of	Timeline		Status
			Start Date	End Date	
4.3.1	Appoint a board member to chair the development committee	CDO DD	5/1/2002	5/30/2002	
1.4.3	Investigate rental or purchase of prospect lists	CDO DD	5/1/2002	5/31/2002	
2.2.6	Investigate video needs and opportunities	DPR CDO	5/1/2002	6/30/2002	
4.3.5	Recruit development committee members	CDO DD BD	6/1/2002	6/30/2002	
2.5.4	Participate in organization activities	ED CDO DD DPR	6/1/2002	12/31/2002	
1.5.3	Hold dance party event	CDO DD EC	6/22/2002	6/22/2002	
4.3.6	Hold first development committee meeting	CDO	7/1/2002	7/31/2002	
4.2.2	Investigate other thrift shops to see what their success factors are	CDO DD	7/1/2002	8/31/2002	
2.2.7	Seek funding for video	CDO	7/1/2002	8/31/2002	
4.4.1	Develop a case for support for planned giving	CDO	7/1/2002	9/30/2002	
4.4.2	Develop a list of potential planned giving committee members	CDO	8/1/2002	9/30/2002	
4.4.3	Develop a list of allied planned giving professionals to cultivate and educate	CDO	9/1/2002	12/31/2002	
4.4.4	Develop planned giving materials	CDO	9/1/2002	12/31/2002	
4.4.5	Launch planned giving program	CDO	1/1/2003	12/31/2003	
<b>Director of Development</b>					
Ref. #	Task Detail	Responsibility of	Timeline		Status
			Start Date	End Date	
1.5.2	Recruit committee to plan event	DD BD	2/1/2002	2/15/2002	
4.3.3	Develop a list of potential development committee members	CDO DD BD	3/1/2002	4/30/2002	

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Ref. #	Task Detail	Responsibility of	Timeline		Status
			Start Date	End Date	
4.3.4	Invite potential development committee members to an orientation meeting.	CDO DD BD	5/1/2002	5/30/2002	
4.3.1	Appoint a board member to chair the development committee	CDO DD	5/1/2002	5/30/2002	
1.4.3	Investigate rental or purchase of prospect lists	CDO DD	5/1/2002	5/31/2002	
1.4.2	Segment donor/prospect lists to determine approach for various prospects	DD CV	5/1/2002	5/31/2002	
1.4.5	Schedule phonathon and secure location	DD	6/1/2002	6/30/2002	
4.3.5	Recruit development committee members	CDO DD BD	6/1/2002	6/30/2002	
2.5.4	Participate in organization activities	ED CDO DD DPR	6/1/2002	12/31/2002	
2.1.1	Invite prospective business leaders to first business leaders breakfast	DD BD	6/15/2002	7/1/2002	
1.5.3	Hold dance party event	CDO DD EC	6/22/2002	6/22/2002	
2.4.2	Develop a list of potential speakers	DD DPR	7/1/2002	7/31/2002	
1.4.6	Recruit phonathon volunteers	DD DPR	7/1/2002	7/31/2002	
4.2.1	Do analysis of past years' thrift shop income	DD	7/1/2002	7/31/2002	
4.2.2	Investigate other thrift shops to see what their success factors are	CDO DD	7/1/2002	8/31/2002	
1.4.7	Prepare phonathon materials	DD DPR CV	8/1/2002	8/15/2002	
1.4.8	Mail pre-phonathon letter	DD	8/10/2002	8/15/2002	
1.4.9	Conduct phonathon	DD CV	8/15/2002	8/31/2002	
1.4.10	Mail follow-up letters	DD	8/31/2002	9/5/2002	

Summary

<b>Director of Public Relations</b>					
Ref. #	Task Detail	Responsibility of	Timeline		Status
			Start Date	End Date	
1.1.2	Prepare draft of case for support	ED DPR	1/2/2002	1/31/2001	Completed
2.2.1	Plan Web site	DPR	2/1/2002	2/28/2002	Completed
2.2.3	Investigate billboard opportunities	DPR	2/1/2002	2/28/2002	
1.1.4	Finalize case for support	DPR CV	2/8/2002	3/15/2002	
2.2.4	Issue news releases	DPR	3/1/2002	12/31/2002	
1.1.6	Prepare appropriate materials from case	DPR CV	3/15/2002	4/30/2002	
2.5.2	Investigate cost and benefits of organizations	CV DPR	4/1/2002	4/30/2002	
2.3.2	Design publicity materials	DPR CV	5/1/2002	6/30/2002	
2.2.6	Investigate video needs and opportunities	DPR CDO	5/1/2002	6/30/2002	
2.5.4	Participate in organization activities	ED CDO DD DPR	6/1/2002	12/31/2002	
2.4.2	Develop a list of potential speakers	DD DPR	7/1/2002	7/31/2002	
1.4.6	Recruit phonathon volunteers	DD DPR	7/1/2002	7/31/2002	
2.3.3	Have publicity materials printed	DPR	7/1/2002	8/31/2002	
1.4.7	Prepare phonathon materials	DD DPR CV	8/1/2002	8/15/2002	
2.4.5	Prepare PPT show for speakers	DPR	8/1/2002	8/30/2002	
2.4.4	Prepare a letter and flyer to be mailed to organizations	CV DPR	8/1/2002	8/31/2002	
2.4.6	Hold training meeting for speakers	CV DPR	9/1/2002	9/15/2002	
2.4.7	Mail letters about speakers' bureau to organizations	DPR	9/15/2002	9/30/2002	

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Implementing the Plan

<u>Event Committee</u>					
Ref. #	Task Detail	Responsibility of	Timeline		Status
			Start Date	End Date	
1.5.3	Hold dance party event	CDO DD EC	6/22/2002	6/22/2002	
<u>Executive Director</u>					
Ref. #	Task Detail	Responsibility of	Timeline		Status
			Start Date	End Date	
1.1.2	Prepare draft of case for support	ED DPR	1/2/2002	1/31/2001	Completed
1.2.1	Appoint board appeal committee	BC ED	12/31/2002	1/8/2003	Completed
4.1.8	Make offer to top CDO candidate	ED	4/1/2002	4/30/2002	
2.5.4	Participate in organization activities	ED CDO DD DPR	6/1/2002		Ongoing
<u>Outside Consultant</u>					
Ref. #	Task Detail	Responsibility of	Timeline		Status
			Start Date	End Date	
2.2.2	Design and install Web site	OC	4/1/2002	5/31/2002	
1.4.4	Look up phone numbers of phonathon prospects	OC	6/1/2002	6/30/2002	
2.2.8	Produce video	OC RDT	9/1/2002	12/31/2002	
<u>Resource Development Team</u>					
Ref. #	Task Detail	Responsibility of	Timeline		Status
			Start Date	End Date	
4.1.2	Develop list of places to advertise for CDO	RDT	12/1/2001	12/31/2001	Completed
1.5.1	Assess previous events and determine which event (s) to hold in 2002	RDT	1/10/2002	2/15/2002	Completed

## Summary

1.3.1	Develop a preliminary major-gift prospect list	RDT	2/1/2002	3/31/2002	
1.3.2	Develop recognition program for major gifts	RDT	2/1/2002	3/31/2002	
1.1.3	Review draft of case for support	RDT	2/7/2002	2/7/2002	Completed
4.1.7	Conduct final interviews for CDO	RDT BD	3/1/2002	3/31/2002	
2.5.1	Prepare a list of potential organizations to join	RDT	3/1/2002	3/31/2002	
2.3.1	Determine publicity materials needed	RDT	3/1/2002	4/30/2002	
2.1.1	Develop prospect list for business leaders breakfast	RDT BD	3/1/2002	4/30/2002	
1.3.5	Prepare major-gift appeal materials	RDT	4/1/2002	5/30/2002	
2.5.3	Join selected organizations	RDT	5/1/2002	5/31/2002	
2.1.2	Prepare agenda and materials for business leaders breakfast	RDT	5/1/2002	5/31/2002	
3.1.3	Evaluate awareness survey	BD RDT	6/1/2002	6/30/2002	
2.1.4	Hold first business leaders breakfast	RDT BD	7/1/2002	7/31/2002	
2.4.1	Develop a list of organizations for speaking engagements	RDT	7/1/2002	7/31/2002	
3.1.5	Identify tag line for public awareness	BD RDT	8/1/2002	8/30/2002	
2.1.5	Evaluate results of first business leaders breakfast	RDT BD	8/1/2002	8/31/2002	
2.4.3	Recruit speakers for speakers' bureau	RDT BD	8/1/2002	8/31/2002	
3.1.4	Evaluate success of cultivation events in raising awareness	BD RDT	8/1/2002	8/31/2002	

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## Implementing the Plan

Ref. #	Task Detail	Responsibility of	Timeline		Status
			Start Date	End Date	
2.1.6	Continue to hold business leaders breakfasts monthly or quarterly	RDT BD	9/1/2002		Ongoing
4.2.3	Evaluate location options for thrift shops	RDT	9/1/2002	10/31/2002	
2.2.8	Produce video	OC RDT	9/1/2002	12/31/2002	
4.2.4	Develop a plan to increase revenue of thrift shop	RDT	10/1/2002	11/30/2002	

**Volunteers**

Ref. #	Task Detail	Responsibility of	Timeline		Status
			Start Date	End Date	
1.3.7	Solicit major gifts	BD VL	6/15/2002	9/30/2002	
2.4.8	Conduct speaking engagements	VL	10/1/2002		Ongoing

### Responsibility Code and Description

Code	Description	Code	Description
BC	Board chair	DD	Director of development
BAC	Board appeal committee	DPR	Director of public relations
BD	Board of directors	EC	Event committee
BP	Board president	ED	Executive director
CDO	Chief development officer	OC	Outside consultant

Source:

Lysakowski, L. *Nonprofit Essentials: The Development Plan*. Wiley & Sons; Hoboken, New Jersey. 2007. Pgs. 171-180.