

Roles and Responsibilities

Director of Development	Donor Relationship Manager	Donor Relationship Assistant
The Strategist & Manager	The "Outside" Person	The "Inside" Person
Primary Focus:	Primary Focus	Primary Focus
Strategy, Management, Accountability	Donors	Admin Support - Research - Resource Acquisition
<p>1. Assure major gift rep secures the very best donors for caseload assignment.</p>	<p>1. Create and maintain caseload.</p>	<p>1. Research donor giving history. Research donor connections and networks for referral purposes (use internet etc.).</p>
<p>2. Assure there is integration between the major gift and direct marketing programs.</p>	<p>2. Create and execute moves management strategy (Donor Engagement Plan - DEP).</p>	<p>2. Maintain Donor Engagement Plan (DEP). Input contacts, moves into database.</p>
<p>3. Provide program results information to the rep so that they can give feedback to donors and let them know they are making a difference.</p> <p>Provide information that will help the rep create effective asks.</p> <p>Be available to meet with selected donors and help the rep gain the availability of the CEO and or President and other members of staff.</p>	<p>3. Build and nurture relationships with donors by visiting, calling, emailing - has primary contact.</p>	<p>3. Remind rep of touches required by DEP.</p> <p>Prepare and send mailings at rep's direction.</p> <p>Handle all logistics with donor contacts including answering phone in rep's absence.</p> <p>Create and maintain individual donor files.</p> <p>Secure internal and external resources for donor communication (news reports, internal memos, books, stories, etc.).</p>
<p>4. Assure that receipting is effective and efficient.</p>	<p>4. Secure gifts.</p>	<p>4. Make sure receipts go out on time.</p>
<p>5. Be a willing part of the thank you process.</p>	<p>5. Create thank you's and assure donors know they are making a difference.</p>	<p>5. Make sure thank you's and information to donors goes out on time.</p>
<p>6. Measure performance, evaluate and be interested in and supportive of the major gift program.</p>	<p>6. Report performance and progress.</p>	<p>6. Keep and report activity statistics.</p> <p>Produce monthly reports.</p> <p>Provide analysis of donor giving.</p> <p>Assure integrity of donor financial data.</p>
<p>7. Analyze ROI of the major gift program. Also be supportive of expansion of labor resources when there are too many donors to handle.</p>	<p>7. Stay in control of budget.</p>	<p>7. Handle expense report. Monitor budget.</p>

Roles and Responsibilities

Director of Development	Donor Relationship Manager	Donor Relationship Assistant
The Strategist & Manager	The "Outside" Person	The "Inside" Person
Primary Focus:	Primary Focus	Primary Focus
Strategy, Management, Accountability	Donors	Admin Support - Research - Resource Acquisition
1.	1.	1.
2.	2.	2.
3.	3.	3.
4.	4.	4.
5.	5.	5.
6.	6.	6.
7.	7.	7.

Roles and Responsibilities

Director of Development	Donor Relationship Manager	Donor Relationship Assistant		
Primary Focus:	Primary Focus	Primary Focus	Primary Focus	Primary Focus
1.	1.	1.	1.	1.
2.	2.	2.	2.	2.
3.	3.	3.	3.	3.
4.	4.	4.	4.	4.
5.	5.	5.	5.	5.
6.	6.	6.	6.	6.
7.	7.	7.	7.	7.