

Different Fundraiser Roles & Responsibilities

Jenny Lehman

Annual Giving

Focus on high volume, low dollar gifts, such as alumni dues and maybe a small gift over and above that amount

These are generally made in cash (credit cards are cash)

Minimal relationship cultivation

Major Giving

Focus on low volume, high dollar gifts, such as naming a building

The gift is immediate, or made in installment payments for a finite period of time

Often made in cash, sometimes made with liquid assets

Room for creativity – money from a paid-up life insurance policy

Increasing relationship cultivation – probably takes more than one conversation

Planned Giving

Focus on low volume, high dollar gifts that are deferred and often contingent

Bequests via a Will are most common

Opportunity for illiquid assets and complex planning tools – charitable trusts, DAFs with beneficiary, life insurance, annuities

Increasing relationship cultivation – will likely take several conversations to truly learn the donor's legacy goals, requires extensive stewardship for many years

Executive Director of Development

In a one-person shop, the EDD may wear all of the hats

Need outside experts to call on

Questions and Discussion