

Annual Fund Manager

Position Summary

The Annual Fund Manager is responsible for managing the Mission annual fundraising efforts, donor cultivation systems, grant activity, fundraising calendar, campaign coordination, donor stewardship processes, and day-to-day coordination with TrueSense Marketing. This position supports the President & CEO in major donor relationships and coordinates internal review of TSM-produced materials, but does not give final approval to TSM.

Reports To

- Chief Financial & Development Officer

Works Closely With

- President & CEO
- Communications Specialist
- Development Coordinator
- Office Coordinator
- Chief Operating Officer
- Program staff as needed
- TrueSense Marketing

Primary Responsibilities

Annual Fund and TSM Campaign Management

- Manage the annual fundraising calendar in coordination with the President & CEO, CFDO, and TSM.
- Coordinate annual appeals, direct mail campaigns, digital appeals, donor newsletters, monthly giving promotions, donor acquisition, lapsed reactivation, and stewardship efforts that are included in the TSM plan.
- Serve as the primary day-to-day internal coordinator for TSM campaign workflow, monthly status calls, strategy calls, resource requests, and internal deadlines.
- Review TSM proformas, quarterly strategy briefs, campaign recommendations, audience strategy, and creative direction from a fundraising and donor relationship perspective.
- Coordinate internal review of TSM proofs in Workfront Proof and submit consolidated CRM comments.
- Notify the President & CEO when a TSM campaign is ready for final approval.
- Review campaign performance and recommend improvements for future campaigns.

CRM-Produced Email Program

- Coordinate the recurring CRM-produced email calendar, including the monthly general email, monthly church email, monthly Keepers email, and quarterly Legacy email.
- Ensure the general, church, and Keepers emails are prepared for the last Thursday of each month unless the schedule is changed by leadership.
- Coordinate topic selection, audience purpose, donor stewardship focus, call to action, review deadlines, and approval routing for CRM-produced emails.
- Work with Communications Specialist on email copy, stories, photos, and formatting; work with Development Coordinator on audience/list accuracy and donor preferences.
- Ensure Legacy emails are coordinated with planned-giving strategy and submitted for President & CEO approval before sending.

Donor Cultivation and Stewardship

- Manage donor cultivation and stewardship activity for assigned donors and donor groups.
- Help identify donors ready for deeper engagement, increased giving, monthly giving, major gifts, or planned giving conversations.
- Coordinate donor tours, donor thank-you touches, follow-up notes, and engagement opportunities.
- Maintain donor contact notes and relationship activity in the donor database.
- Help improve donor retention and lapsed donor re-engagement.
- Translate TSM reporting and campaign results into internal donor follow-up plans.

Major Donor Support

- Support the President & CEO in major donor relationship management.
- Prepare donor profiles, giving histories, meeting notes, and suggested next steps for CEO donor meetings.
- Help schedule donor meetings, tours, calls, and follow-up contacts.
- Track follow-up assignments after CEO donor meetings.
- Help maintain a major donor pipeline.
- Recommend donor cultivation strategies to the President & CEO and CFDO.
- Support planned giving identification and cultivation under the President & CEO direction.

Grants Management

- Research foundation and grant opportunities.
- Maintain a grant calendar with deadlines, submissions, reports, and renewal opportunities.
- Draft and submit grant proposals as approved.
- Coordinate with CFDO on grant budgets, financial attachments, and restricted funding requirements.
- Coordinate with COO and program staff for program descriptions, statistics, outcomes, and stories.
- Track grant reporting deadlines and ensure reports are prepared and submitted on time.
- Prepare grant reports using financial information from the CFO/CFDO and program information from the COO or program staff.

- Route grant reports to the President & CEO for approval before submission.
- Submit approved grant reports and maintain submission records.

Responsibilities Excluded From This Position

- Final approval to TSM for print, mail, deployment, release, paid media launch, donation form launch, or campaign release.
- Gift entry, receipt generation, deposit preparation, routine bank deposits, bank reconciliation, payroll, accounts payable, donor database administration, official accounting records, office reception, routine mail opening, full social media management, full graphic design production, and all photography/videography.

Key Success Measures

- TSM campaign calendar and internal deadlines are maintained.
- Internal proof review is completed on time and submitted as consolidated comments.
- President & CEO receives clear final approval packets.
- Grant deadlines are tracked and met.
- Donor follow-up is timely.
- Campaign results are reviewed and translated into stewardship actions.
- The role remains focused on fundraising leadership, not gift processing or office administration.