

## **Fundraising Team – Gate Keeper and Account Manager - Roles and Responsibilities**

**By Gideon Herscher, April 27, 2025**

“Personally, I am very fond of strawberries and cream, but I have found that for some strange reason, fish prefer worms. So, when I went fishing, I didn’t think about what I wanted. I thought about what they wanted. I didn't bait the hook with strawberries and cream. Rather, I dangled a worm or grasshopper in front of the fish and said: "Wouldn't you like to have that?"

Why not use the same common sense when fishing for people?”  
— Dale Carnegie, How to Win Friends & Influence People

The primary goal of this team structure (GK/AM) is to logically divide responsibilities related to the servicing and ongoing cultivation of a donor.

### **General Discription:**

The GK directly services the donor relationship and provides the donor with experiences and content that propels the relationship forward. The account manager spends their time on the internal workings of the contribution and its impact. The account manager has access to program-related information, updates, and nuances that the GK does not have (nor do we want the GK to spend their time on those details).

Each function comes with specific skills set:

GK: Highly engaging and agile. Seasoned in frontline fundraising. High emotional intelligence.

AM: Highly organized. Strategic thinker. Good thought partner. Detail-oriented. Service-oriented.

These two separate functions are needed.

### **A successful AM/GK relationship can be defined in the following way:**

- ✓ Mutual respect for each other’s experience and area of expertise.
- ✓ Strong thought partnership.
- ✓ Perfect coordination and communication between AM and GK around the implementation of an annual engagement/work plan.
- ✓ A happy donor who feels seen and invested in.
- ✓ Increase in the donor’s sense of connection to the University and an increase in their financial support.

## **Division of labor:**

### **AM**

- ✓ Inward facing. Focuses on the quality of the relationship and putting administrative pieces of the puzzle in place to help build trust and communication with the donor.
- ✓ the AM would be responsible for making sure that everything in the donor agreement/contract/proposal is implemented, both on the program side and the communication (report) side. They also make sure that funds are transferred as planned, and they alert the GK of any delays.
- ✓ The AM knows the details of the contribution and works with the field (the scholar) on a quarterly basis to monitor the program status and alert the GK of any unexpected delays or changes.
- ✓ All written communication that comes from the University is overseen and approved by the AM. The AM provides quality control.
- ✓ The annual work plan for the donor (and related strategy) is tracked and implemented by the AM.

In my past job, we defined this function as:

- ❖ Proactive management of donor relationships and partnerships to further the organization's resource development goals.
- ❖ Preparation of specialized written materials including writing and editing grant applications and customized proposals, reports, and other materials.
- ❖ Tracking and management of information related to cultivation, solicitation, and donor stewardship.
- ❖ Accompaniment of funders to visit donor projects in Israel, including public speaking and group facilitation.
- ❖ Serve as a key conduit of program information to front line fundraisers.

### **GK**

- ✓ Donor-facing. Focuses on the strategy of the relationship.
- ✓ The GK solicits the donor and serves as the primary point of contact and communication with the donor. Most of the donor cultivation strategy is initiated by the GK. The final layer of quality control and customization for the donor comes from the GK.
- ✓ The GK represents the University and the related product.
- ✓ The GK does not necessarily need to be an official fundraiser. The GK is defined as the person with the most likelihood of successfully fundraising from the donor. In most cases, the GK co-builds the donor cultivation strategy with the AM, but not always. In those cases - there will be Gatekeeper One from our team and is usually senior, and Gatekeeper Two who can theoretically be a professor or someone not on our team.