



## Recommended CRM Staff Responsibility Chart

*This is a suggested map of roles and responsibilities in terms of CRM ongoing tasks, maintenance and workflows - to be confirmed and assigned by the Executive Director. A “checklist” or “how-to” job-aid for each task and hyperlinked [here](#).*

TASK	FREQUENCY	RESPONSIBLE
If a constituent doesn't want to receive emails anymore and asks to be removed from our lists.	As needed	
Update someone's personal information (name change, new email/address/phone, etc).	As needed	
Enter cash/cheque payments/donations into eTapestry	As needed	
Reissue/generate Membership receipt (i.e. a Member lost their receipt or requested another copy)	As needed	
Maintain the monthly newsletter template, draft newsletters, send/mail out to segmented lists (schedule in advance)	1x week	
Send out a duplicate tax receipt (i.e. if a donor lost their receipt and needs us to reissue one)	As needed	
Merging duplicate accounts	Monthly	
Send the 30 day membership renewal notice - mass email	Monthly	
Mass update	Infrequently	
Mass import	Infrequently	