

OBJECTIVE/STRATEGY PLANNING WORKSHEET

Goal/Focus Area Active board that is willing to participate in fundraising.

Objective Discuss donor recognition and process at board meetings (what has happened since last meeting)

Strategy Add agenda item to discuss current donor activity, emphasis on new donors. Can be in-kind, funds, fundraising activities.

Who	Will Do What	By When	Evaluation Measure	Budget Resources
Staff	add this item to board meeting agenda	June meeting		none (time)

Strategy Determine levels to highlight (new recurring donors, major gifts, etc.)

Who	Will Do What	By When	Evaluation Measure	Budget Resources
Staff	Staff send list to ID callouts.	June meeting		none (time)

Strategy Determine next point of contact

Who	Will Do What	By When	Evaluation Measure	Budget Resources
Board member	Board member receive donor's contact info to connect (phone call, hand-written note, etc.)	goal to make contact within one week of board meeting?	track via Google doc, board members to report	notecards and postage (if applicable)

Staff create a Google doc in the Board portal, where members could "sign up" for which donors they will contact.