| **Area** | **Recommendation** | **Steps (Assigned by Staff & Board)** | **Suggested Responsibility** | **Suggested Priority Level** | **Suggested Goal Completion Date** | **Notes** |
| --- | --- | --- | --- | --- | --- | --- |
| donor recruitment & retention | *set annual and monthly goals for number of donors and amount of donations* | - review historic donor data- set goals for board members: prospects, donors, amounts, etc. | ED, Fundraising Committee | High | Immediate |  |
| donor recruitment & retention | *identify potential donors through monthly prospecting at Board meetings, attendance at events connected with public education, access to associated mailing lists, referrals from other donors or volunteers, etc.* | - review personal and professional connections- identify prospects | ED, Board of Directors, Fundraising Committee | Critical | Short-Term & Ongoing | Requires full participation from all board members. |
| donor recruitment & retention | *assign donors and prospects to Board members for follow-up* | - assign each prospect to an individual Board member (not necessarily the member who identified prospect) | Board of Directors, Fundraising Committee | High | Short-Term & Ongoing |  |
| donor recruitment & retention | *regular communication and thank yous with donors and prospects* | - thank you note upon donation- assigned board member notified of donation to reach out with extra thanks- monthly/quarterly communication about [affiliate] programs and accomplishments- “special event” communication (i.e. first day of school, Children’s Book Week, major donations, etc.) | ED, Board of Directors, Fundraising Committee | High | Short-term and Ongoing | Thank you notes are being sent.  |