

# Board Member Action Plan

Prepared for: \_\_\_\_\_

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Donor Name: \_\_\_\_\_

Purpose:  THANK  ASK

Donor Phone: \_\_\_\_\_

Donor Email: \_\_\_\_\_

Last Gift or Ask Amount: \_\_\_\_\_ Date Completed: \_\_\_\_\_

Notes: \_\_\_\_\_

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## Board Fundraising Goal-Oriented Schedule

### Quarter 1 (eg January – March)

- Every board member thanks donors in January
- Every board member makes a February gift
- You meet with the WORKERS in March to get them ready to ask.

### Quarter 2 (eg April – June)

- The Workers make their first ask
- The Just-Enoughers and MIAers thank donors
- Meet with the Just-Enoughers in May to get them ready to ask

### Quarter 3 (eg July – September)

- The Just-Enoughers make their first ask
- The MIAers and the Workers thank donors
- You meet with the MIA-ers in August to get them ready to ask

### Quarter 4 (eg October – December)

- The MIA-ers make their first ask
- The Workers and Just-Enoughers make year-end asks
- Every board member thanks donors.

### Bonus tips for transforming your Thankers to Askers

- Talk about the culture of major donor engagement
- Celebrate WINS
- Make it FUN
- Make it EASY