Donor Prospect Call Sheets

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Donor Prospect Call Sheet
Completed by __________________________

Prospect/Donor ____________________________________________________

Purpose:  ___ Introduction ___ Cultivation ___ Solicitation
___ Telephone ___ In-person ___ Email exchange ___ Other
___ Planned ___ Chance meeting/opportunistic

Call by: _____________________________ ___ Volunteer ___ Staff

Where was the meeting? ___________________________________________

Specific purpose of the meeting ______________________________________
________________________________________________________________
________________________________________________________________

Donor’s capacity _________   Donor’s affinity __________

Lead Staff ___________   Primary Vol ___________   2’ary Vol ___________

What was discussed?
________________________________________________________________
________________________________________________________________
________________________________________________________________

What was the prospect’s response and attitude?
________________________________________________________________
________________________________________________________________
________________________________________________________________

What will you do next?  When?
________________________________________________________________
________________________________________________________________
________________________________________________________________

What will the prospect do next?  When?
________________________________________________________________
________________________________________________________________
________________________________________________________________

Did you make a commitment on behalf of someone else?
________________________________________________________________
________________________________________________________________
Donor Prospect Call Sheet
Completed by Ann Gerry

Prospect/Donor Jim Davis

Purpose:  ___ Introduction ___ Cultivation x Solicitation ___ Telephone x In-person ___ Email exchange ___ Other

x Planned ___ Chance meeting/opportunistic

Call by: Gerry, Wouk x Volunteer x Staff

Where was the meeting? Davis’ home, with Mrs. Davis

Specific purpose of the meeting To ask Mr. Davis to a gift of $100,000, unrestricted. Wouk has been cultivating Davis for a couple weeks, and Davis was clear he would give.

Donor’s capacity 3 Donor’s affinity 3

Lead Staff Gerry Primary Vol Wouk 2’ary Vol Ullman

What was discussed?

Davis clearly wants to give, in fact, he said he’d give us $100k if we could get Ullman to match.

What was the prospect’s response and attitude?

Very positive. Wants to not only give but also help us cultivate and solicit others.

What will you do next? When?

Ullman has already given $50k. Need to meet with him and tell him of Davis’ challenge.

What will the prospect do next? When?

Nothing yet, its up to us to get a match to his challenge.

Did you make a commitment on behalf of someone else?

Yes, I said Station Manager or Board Chair would call him Wednesday.
Simplified Call Sheet for Volunteer Calls

Completed by ___________________________

Prospect/Donor __________________________________________________

Call by: _____________________________  ___ Volunteer  ___ Staff

Where was the meeting? ___________________________________________

When was the meeting?  ___________________________________________

Specific purpose of the meeting ______________________________________

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What was discussed?
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What is the next step?
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