



Constituent/Prospect:

Contacted by: _____

Contact Date: _____

Contact Location: _____

(Address, City, Zip)

____ Office ____ Home ____ Other (explain)

Contact Information

Type of Contact:

____ Mail ____ Phone ____ E-Mail ____ In Person Visit

Purpose of Contact:

____ Initial Visit ____ Cultivation ____ Consult re other prospect ____ Solicitation ____ Discuss Gift Details

____ Inquiry Follow-Up ____ Stewardship ____ Volunteer Recruitment/Management ____ Other

Campaign Gift

Add/Update Proposal Information: Amount: \$ _____

Purpose of Gift: _____

Proposal Status:

____ Needs Initial Visit by Prospect Manager ____ General Cultivation ____ Focused Cultivation

____ Ready to be Asked ____ Solicited ____ Stewardship

Constituent

Prospect Status (Interest level)

Commitment ____ (5) Participation ____ (4.5) Concern ____ (4) Interest ____ (4,3) Knowledge ____ (3)

Awareness ____ (2) Not Aware ____ (1)

Capacity (Ability to give assume three year commitment)

\$50,000+ ____ (5) \$25,000 -\$49,999 ____ (4.5) \$15,000 -\$24,999 ____ (4) \$10,000 -\$14,999 ____ (3.5)

\$5,000 -\$9,999 ____ (3) \$2,500 -\$4,999 ____ (2.5) \$1,000 -\$2,499 ____ (2) \$500 -\$999 ____ (1)

Next Steps: _____ Due Date: _____

Narrative Details of Contact: