

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 _____

What was discussed?

What is the next step?
