

PROSPECT WORKSHEET

Date: _____

**GIVING
TARGET:**

Name: _____

Title: _____ Company: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Telephone: _____ Fax: _____ Email: _____

1. Who knows this person? How?

2. What is this individual's connection to your organization or project? What makes this person a good candidate for a meeting?

3. What else do you know about this person or business?

Other Charities supported (highlight Board or other leadership):	Civic Organizations:
College/university attended:	Other schools attended:
Hobbies/activities/etc.	Other:
Other interests:	

5. What is their capacity for making a gift? At what level? Why?

6. What special strategy or instructions do you recommend for meeting with this person?