

RATING & RESPONSE SHEET

Donor ID#

Group A-C

Major Donor Prospect: _____

Preferred Name/Salutation: _____

Type of Activity/Visit: Research Relationship Request
 Recognition Recruitment Report

Solicitor(s): _____

Staff/Counsel: _____

Proposed Request Amount \$ _____

Proposed Request Designation (General/Hot Button): _____

Strategy: _____

Action steps: Planned column

*Initial call(s) for visit and date(s) attempted
 Notes on what timing is best if not now*

*Proposal preparation date/type
 Date/location of visit*

Action Steps: Completed column:

*Date/time for completed visits, participants
 Follow-up ? research/feedback promised donor
 Outcome/result date/amount*

*Thank you note written, by whom
 Follow-up call(s) within 7-10 days
 Acknowledge pledge email/letter*

Action Steps			
Planned	Date	Completed	Date

Notes From Visit (for CRM)

Relationship/Connection to the organization?

Age(s): _____

Family Notes:

Career(s)

General Interests:

Ministry Interests with ECA/Others:

Important Takeaway Notes:

Next Steps (Communication/Future Visit):
