

Prospect Donor Rating Worksheet

Completed By: _____ Title: _____

Prospect Name: _____ Phone: _____

Street Address: _____ City: _____ State: _____ Zip: _____

Business/Profession: _____

How would rate this person's **ability** to give (wealth)? _____ Low _____ Medium _____ High

How would you rate this person's **interest** in the project/organization? _____ Low _____ Medium _____ High

How are you **connected** to this person?

_____ Family

_____ Service club or similar

_____ Friend

_____ Through church

_____ Neighbor

_____ Through spouse

_____ Co-worker

_____ Through children

_____ Former colleague or peer

_____ Other: _____

Describe how close you are to this person: _____

Has this person donated to the organization before? _____ No _____ Yes – When & Why? _____

What clues indicate that this person has **charitable intent**? _____

What **social connections** does this person have? _____

What are his/her personal **values**? _____

To which charities has he/she given to? _____

With whom does he/she do business? _____

What does he/she do when not at work? _____

When was the last time he/she visited our site/organization? _____

Priority Ranking

Affinity Level (3, 2, or 1) _____ Life Stage (3, 2, or 1) _____

Priority Ranking (Affinity Level x Life Stage) = _____

_____ Pursue with priority _____ Pursue with less priority _____ Pursue casually

Affinity	Life Stage
3 = Institution among 1 or 2 most important places to donor's interests	3 = Empty nest, healthy or deceased spouse; ready to dispose of wealth
2 = Among 3-5 most important	2 = At peak of career, inheritance is expected; not disposing of wealth yet
1 = Know you and support you	1 = Mid-way through career, still caring for family

Priority Ranking	
9 = Best prospects; most committed, most disposable wealth, ready to give	3 = Committed but can't give, or can give but not committed. Cultivate the latter.
6 = Second best prospects; need to become more committed, need to get older	2 = Not worth pursuing now, but keep on the radar.
4 = Needs to become more committed and in a better position to give	1 = Not worth pursuing now, but keep on the radar.