**WORKSHEET**

**Preparing for Contact with A Donor Prospect**

Your prospect research is complete. You have a strong list of qualified and cultivated donor prospects ready for solicitation. Your case statement and supporting materials about your NPO are all ready to go. Your volunteers have been chosen and asked, by a Board Member or the Executive Director, to support this project with a donation as well as their time to help contact other donor prospects. The final steps, before you make direct contact, are detailed below:

**Step One: Volunteer Accepts Solicitation Assignment:** Volunteers receive a solicitation packet, which includes: a list of donor prospects that they are assigned to contact (and indicating whether or not they are to be the Lead Solicitor); confidential research on each donor prospects; and a solicitation worksheet. If a Volunteer is uncomfortable with any of the prospects assigned to him/her, the Volunteer should notify the NPO immediately for reassignment.

**Step Two: Strategy Meeting:** The Lead Solicitor takes responsibility for setting up a 15-minute meeting or Skype call involving the Co-Solicitor and/or NPO staff to:

* Review the confidential research on the donor prospect.
* Confirm the campaign “ask” amount.
* Using the *Successful Solicitation Worksheet*, discuss specific roles and responsibilities that the Lead solicitor, Co-solicitor and/or NPO staff will take on during the actual solicitation. Put names beside numbers 1 to 8.
* NPO Staff will arrange for delivery to the Lead Solicitor of a proposal packet containing a personalized proposal that notes the targeted “ask” amount, a set of supporting materials and a pledge form and envelope.

**Step Three: Getting the Appointment:** The Lead Solicitor calls to obtain an appointment with the prospective donor to talk about the project. During the call, the Lead Solicitor will need to explain to the donor prospect why he/she would like to schedule the meeting. As soon as the appointment is set, the Lead Solicitor immediately notifies the Co-solicitor and NPO staff. The staff then arranges for delivery to the solicitors of the proposal packet, if it was not already delivered.

**Preparation is complete. You are ready for donor contact and a successful solicitation!**