**Preparing for Contact with Prospect Donor Worksheet**

Prospect Research is complete. You have a strong list of qualified and cultivated prospect donors ready for solicitation. Case Statement and all supporting materials about your NPO are 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. Final Steps before contact are:

**Volunteer Accepts Solicitation Assignment:** Volunteers receive the solicitation packet, which includes confidential research on the prospective donor, a solicitation worksheet and return envelopes addressed to the NPO Office. If you are uncomfortable with any of the prospects assigned to you, please notify the office immediately to discuss reassignment.

**Strategy Meeting:** The Lead Solicitor 1 takes the responsibility for setting up a 15-minute meeting or conference call involving the Co-solicitor 2 and NPO staff to:

* Review the confidential research.
* Confirm the Campaign “ask” amount.
* Using the Successful Solicitation Worksheet, discuss specific roles and responsibilities that the Lead solicitor and Co-solicitor will do during the actual solicitation. Put names beside 1-8.
* 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/s to talk about the project. Tell them why you are coming. The Lead Solicitor notifies the Co-solicitor and the staff as soon as the appointment is set. The staff then arranges for delivery to the solicitors of the proposal packet.

**Preparation complete. You are ready for Donor contact and a successful solicition!**