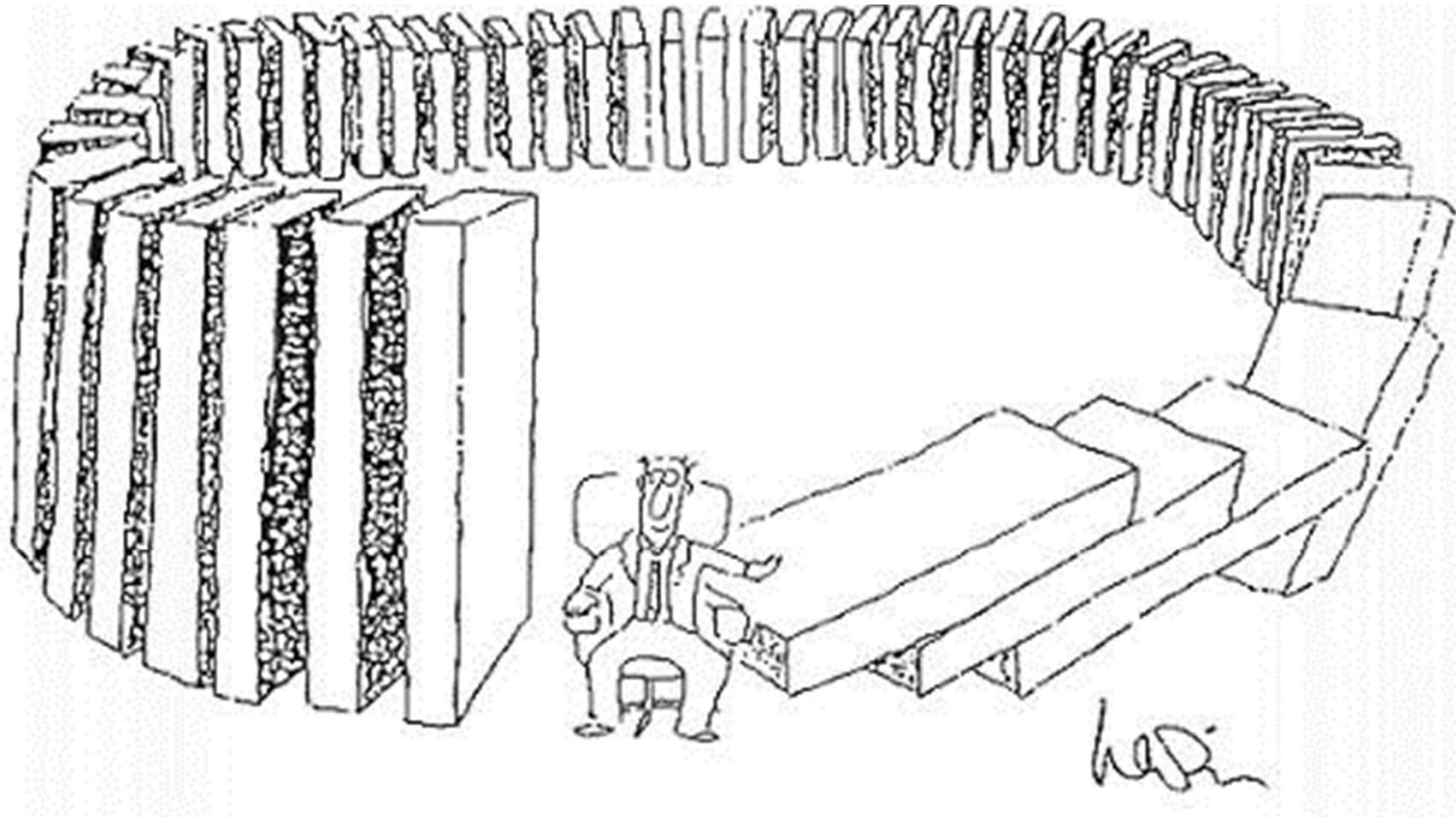




Lack of Planning



What is Intentional Fundraising?

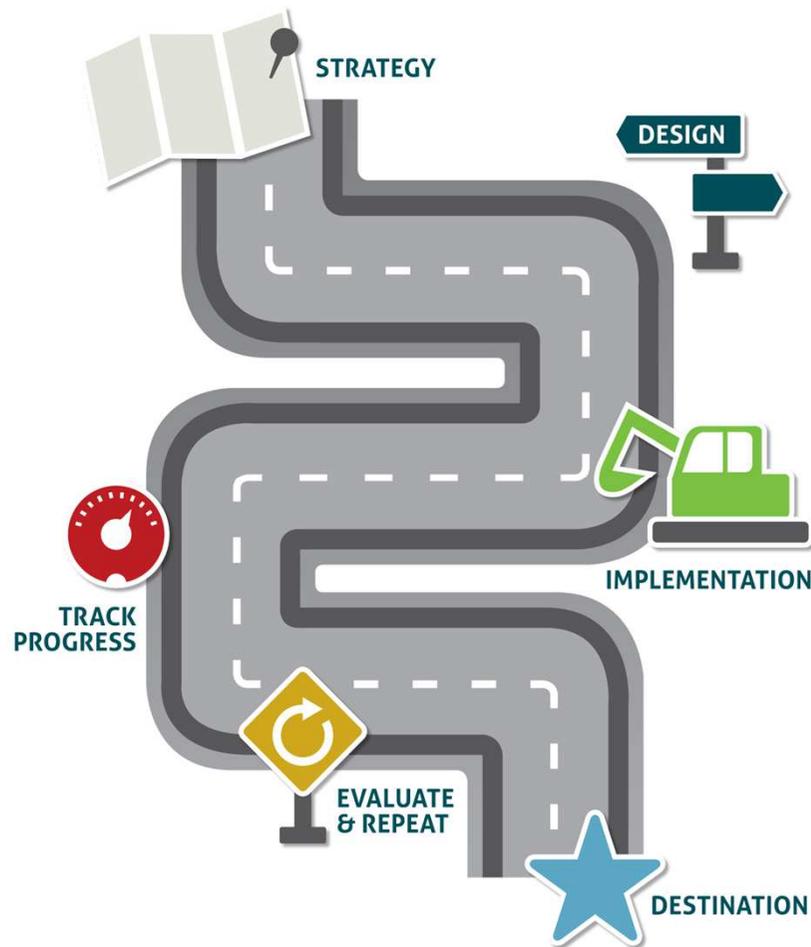


- Being **THOUGHTFUL** in your approach
- **CONSIDERING** the move you want to make
- Having **CLARITY** about what you want to make out of the move

From the start....

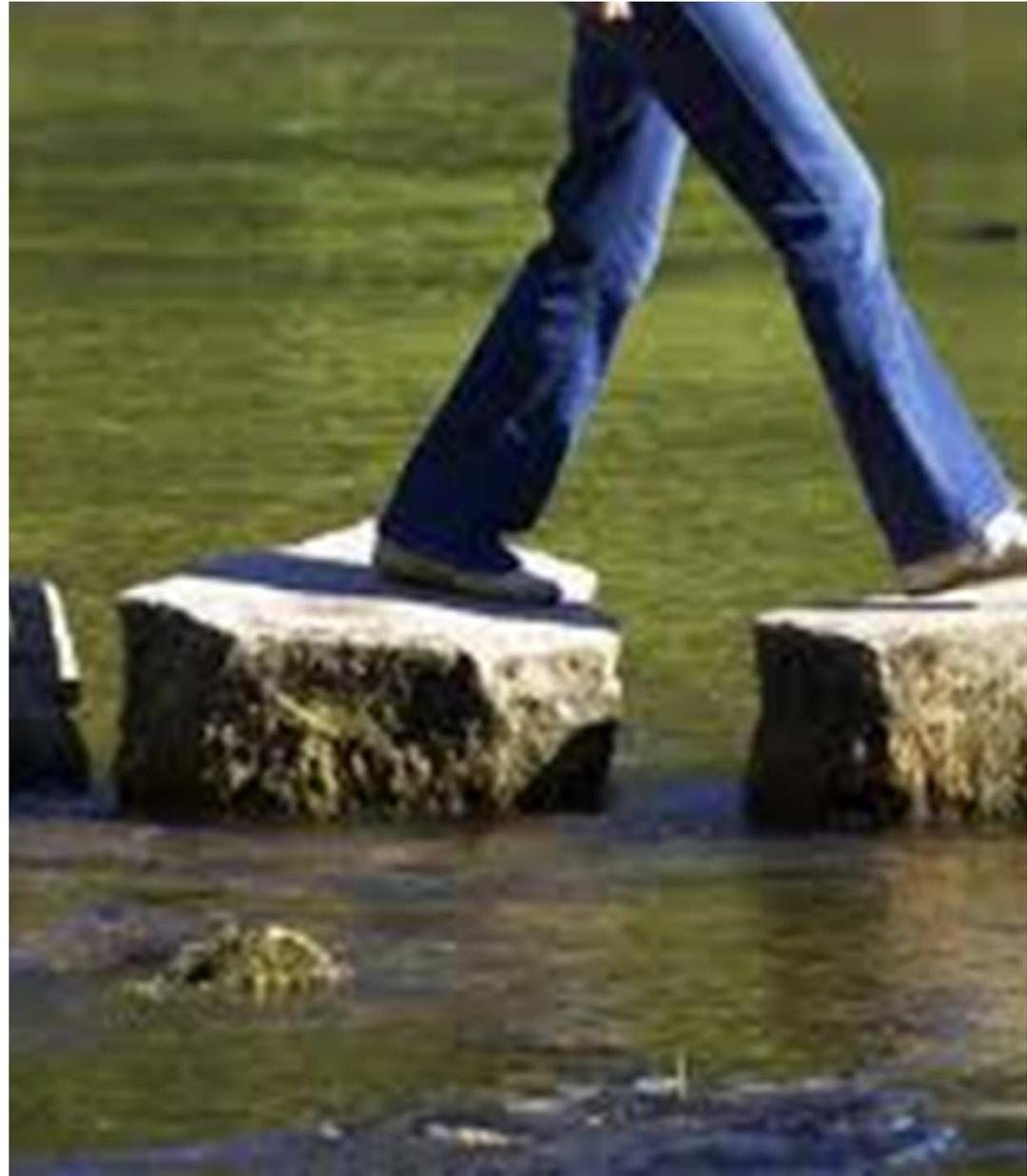


Know where you want to end up



- Begin planning your steps:
 - Have a strategy
 - Know where you are starting/ending
 - Have a few planned moves
 - Continually map your moves

**Consider each
step along the
way**



MEETING PLANNER

Meeting with: _____

Others attending: _____

Purpose of the meeting:

___Initial meeting ___Cultivation ___Solicitation ___Stewardship

___Other (Be Specific)_____

Hoped for outcomes:

What is needed for the meeting? *(things to bring, information to have on hand)*

What things do I need to learn about this prospect?

What do I need to remember to impart?

THE CALL REPORT

- Did I learn something new about the donor that will help me get that gift?
- Did I learn what motivates them
- Do I know what they love most about us?
- Do I know what they care about and would personally support?

DATE: <i>When the report is filed</i>
Prospect Name:
Contact information: <i>Assuming this person is in your database, you only need enough on this report to identify the correct record.</i>
Contact made by: <i>everyone involved with the call.</i> Staff: Volunteer:
Date of Contact: <i>When the call took place</i>
Type: <i>How the contact happened:</i> ___ Phone Call ___ Other (Describe) _____ ___ Letter ___ Meeting
Purpose of Call: <i>Why you set the meeting</i> ___ Informational: <i>First meeting/qualifying prospect</i> ___ Cultivation: <i>Have qualified/moving toward gift</i> ___ Solicitation: <i>Meeting to ask for/negotiate about the gift</i> ___ Stewardship: <i>Gift has been made/all steps to keep donor connected until you begin cultivation of this prospect for any follow-on gift</i> ___ Other (Describe)
Pertinent Information: <i>Any NEW information gleaned as a result of this gift</i>
Results of Call: <i>What happened as a result of this call?</i>
Next Step: <i>Specifically, what, who is responsible, by when?</i>

WHAT IS YOUR NEXT MOVE?



Janet Levine



Web: <http://janetlevineconsulting.com>

Email: janet@janetlevineconsulting.com

Phone: 310-9909151