



# JANET LEVINE

## CONSULTING

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> <b>Staff:</b> <b>Volunteer:</b>
Date of Contact: <i>When the call took place</i>
Type: <i>How the contact happened:</i> <input type="checkbox"/> Phone Call <input type="checkbox"/> Other (Describe) _____ <input type="checkbox"/> Letter <input type="checkbox"/> Meeting
Purpose of Call: <i>Why you set the meeting</i> <input type="checkbox"/> Informational: <i>First meeting/qualifying prospect</i> <input type="checkbox"/> Cultivation: <i>Have qualified/moving toward gift</i> <input type="checkbox"/> Solicitation: <i>Meeting to ask for/negotiate about the gift</i> <input type="checkbox"/> 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> <input type="checkbox"/> 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>