

Handout

Pre-Approach Information Checklist

PROSPECT:

- Who is the ultimate decision maker in saying yes to a gift?

- Who else influences the decision?

- Has this person ever donated to my nonprofit before?
Frequency? Level? Designation? History?

- What are some of the background details and personal interests of the decision maker or others who will be present?

- What do their personal interests tell me about their passions and priorities? Do those passions align with the work and mission of my nonprofit?

- What other types of charitable giving have they engaged in?

- Do I know any of their close friends or colleagues personally? Are any of them current or past supporters of my nonprofit?