

Prospective Donor Identification Exercise

Your Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Your Email \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. *Employer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*
2. *Other Boards: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*
3. *Other Organization: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*
4. *Church/Religious: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*
5. *Companies you work closely with: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*
6. *Alma Mater/Children’s School(s): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*
7. *Spouse’s Affiliations: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*
8. *Friends: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*
9. *Neighbors:*

*\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

1. *Connection to Another City: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

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| --- | --- | --- | --- | --- | --- |
| 1. | Cap. | Aff. | 2. | Cap. | Aff. |
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|  |  |  |  |  |  |
|  |  |  |  |  |  |
| 3.  | Cap. | Aff. | 4. | Cap. | Aff. |
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|  |  |  |  |  |  |
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| 5. | Cap. | Aff. | 6. | Cap. | Aff. |
|  |  |  |  |  |  |
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***Instructions for participants:***

*Fill in sections A. – J. as best you can. You may not be able to fill in each category but try being creative.*

*Once you have filled in the upper section take any six answers and place them in the boxes labeled 1. – 6.*

*Now in the five boxes below each category list a few names of people who might be interested today or could be interested in the future. Repeat for each category you have chosen.*

*Next to each name there are columns for Capacity to Become a Donor (Cap.) and Affinity for the Mission (Aff.). On a scale of 1-10 rank each entity listed in each column. Capacity means their ability/willingness to donate. Affinity means how interested they are in your mission. These are simply guesses based on your judgment.*

*Example:*

*Employer – Starbucks Corp.*

1. *Jeremy Bronson 7 10*
2. *Nick Martin 3 4*

***Instructions for leaders:***

*Record all names and data including who suggested them in a spreadsheet. Send each exercise participant their list back and request contact information for each entity. This is easiest to do when people are back at their desks or home.*

*Prioritize those who have the highest combinations of Capacity & Affinity.*

*Contact those you would like to invite personally. Create an engagement plan or strategy for the remainder. Keep track of progress and send progress to stakeholders.*

*For those without a clear connection or who require special attention please send them to the Executive Director or CEO.*