



Knowledge Base Worksheet

Prospect:

Capacity: *The rating and where this came from (referrals, business, screening, other). For example, John - Board Member says “Joe and Jill could underwrite the entire campaign if they wanted to.”*

Relationship: *to the Organization, Case, Cause, Project, etc. Also include Connectors, Natural Partners, and Other Connections*

Gift History: *Keep it simple. Last, Largest, and Total. Don't forget Planned Gifts.*

Timing: *Around you/the organization as to order of visits, best time, etc. Not as much about prospect life, business, family, etc.*

Other Gifts: *Other known philanthropy - name of organization, size of gifts. Existing pledges or commitments elsewhere.*

Additional Discovery/Research Required:

Additional Notes: *e.g., corporations or foundations, how to ensure you have the top officers, primary contact, or internal champion, etc.*



Reference: Knowledgebase_Template_20221007 (MTR-27)

