***[Please save a copy of the template before filling in]***

**Prospect Strategy Worksheet**

**Strategy Meeting Date:**

**Prospect Name & ID:**

**Staff Responsible:**

|  |  |
| --- | --- |
| **Overall Strategic Goal:** |  |
| **Short-term Goal(s):** |  |
| **Long-term Goal(s):** |  |
| **Campaign Giving Opportunities:** |  |
| **Bequest Solicitation:** |  |
| **Campaign Capacity:** |  |
| **Campaign Ask(s):**  (Amount/Designation/Type of Gift): |  |
| **Date(s) of Campaign Ask(s):** |  |
| **Key Players:**  (Development staff, Leadership, Volunteers) |  |
| **Challenges to Address:** |  |
| **Engagement Opportunities:** |  |
| **Volunteer Engagement Opportunities:** |  |
| **Stewardship Plan Strategies:** |  |

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| **10 Next Steps** | | | | | |
| **Date** | **Type** | **Staff Responsible** | **Purpose/Goal** | **Due Date** | **Participants** |
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