

Right Person

Who do they know?:

Connection to the organization

Connection to board, staff, or volunteers

Affinity for the mission:

Who should do the ask? Who should be there?

Right Project

How will the gift be used?

Interests, hobbies, professional/personal experiences:

What incentives might encourage this gift?

Right Amount

Prospect rating (if applicable):

Gift history to organization:

Other charitable giving:

Right Time

Professional/personal status:

(Sale of business, gain/loss of asset, or other factors that might affect timing of gift)

Organizational needs: