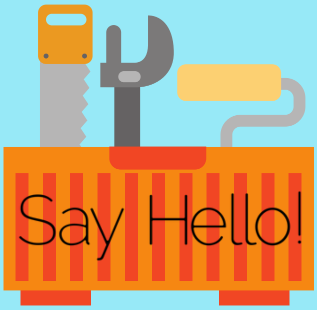
the OLYMPIA COLLECTIVE

Fundraising Tool #2:



CONTACT REPORT CHECKLIST

Be sure to include the following items in your contact reports after you have significant conversations with your VIPs, prospects, donors, and volunteers. Once complete, circulate it to anyone that might need to know about the conversation. And don't forget to upload it into your database and/or donor files so that you (and your organization) can find it in the future!

- Name(s) of donor(s) in attendance
- Name(s) of other(s) in attendance
- Date, time, and location of conversation/meeting
- Contact method: in-person meeting, Zoom call, phone call, email
- Purpose of meeting
- Highlights from the meeting that are pertinent to the organization and moving the person forward in their engagement. Do not include gossip, overly personal information, or information that is not approved to be shared by the donor. Donors can ask to see their records at any time.
- Next steps including approximate timing of each step and who will do them
- Name of who completed the report and date completed

EXTRA BONUS ITEMS

- Donor lifecycle stage, if you track it
- Photo of donor/prospect/volunteer, if available
- Lifetime and/or recent giving (if donor)
- Other information relevant to the meeting: names of family members, children, pets, and/or significant recent news relevant to the donor/prospect

10/19/21