

Donor Contact Record
*(Please fill out and share each contact with your assigned liaison or district leader.)*

Contact Date: Click or tap here to enter text.

Club Advocate Name: Click or tap here to enter text. Liaison Name: Click or tap here to enter text.

Donor Name: Member ID (if known) Click or tap here to enter text.

Club Name: Click or tap here to enter text.

Type of contact ***(Choose one)***: Tel [ ]  Email [ ]  Personal Visit [ ]  Event [ ]

Other (describe) Click or tap here to enter text.

Purpose of Contact ***(Choose one)***:

Introduction/Identification [ ]  Cultivation [ ]  Solicitation [ ]  Stewardship [ ]

Brief Summary of Discussion:
Click or tap here to enter text.

Description of donor interest, capacity, motivation, and/or propensity to make a major gift:
Click or tap here to enter text.

Concerns/Opportunities as a result of this contact:
Click or tap here to enter text.

Next Steps and timeline:
Click or tap here to enter text.