

TO BE INTERVIEWED



_____ Date

_____ Time

_____ Location

RANK: _____
(to be completed by interviewer)

NAME: _____

Business:

_____ Title Telephone

_____ Company

_____ Address

_____ City State Zip

_____ Telephone

Relationship with Organization: _____

Giving History with Organization: _____

Giving to Other Organizations: _____

Personal Data: (Church, University, Spouse, etc.) _____

Family History: _____

Possible Objections or Problems: _____

Special Strategy or Instructions: _____

PROSPECT EVALUATION GRID ©

Name

Ranking (total of both numbers)

High
Financial Capability
Low

9	Unlikely Prospect 1/9								9/9 Ideal Prospects
8									
7									
6									
5					Target Prospects 5/5				
4									
3									
2									
1									Dedicated Volunteer 9/1

High
Financial Capability
Low

1 2 3 4 5 6 7 8 9

Identification Interest Involvement Investment
Low Current Interest or Involvement High

JEROLD PANAS, LINZY & PARTNERS

Guide—Current Interest/Involvement
 1 Not on mailing list
 2-3 Some identification
 4-5 Has demonstrated some interest
 6-7 Has been involved
 8-9 Heavily involved or significant record of giving

5/5 and above	Target Market
6/6 and above prospects	Major Gift Prospects
Grid Location	Description of Prospects
1/1	Negligible Interest/Little Capability
1/9	Negligible Interest/Great Capability
5/5	Beginning of Target Market
9/1	Very Involved/Negligible Capacity
9/9	Ideal Prospect

PEG Ranking for Major Gift (total of both numbers)
 2-6 Very Poor Prospect
 7-10 Marginal
 11-12 Fair
 13-14 Good
 15-17 Very Good
 17-18 A Superb Prospect!