

Cultivation/Stewardship Plan for	
Primary Contact_	

What is known: This includes what their relationship is with you as well as their giving history, connections, areas of interest)

What is possible: This is what you hope their gift/relationship will be. It should be aspirational but also achievable)

Month	Activity	Who Else is Involved
	How will this donor be "touched" this month. NOTE that a touch or move can easily be sending a newsletter, inviting to your event, sending an article, taking on tour, as well as a face-to-face meeting	Who beyond the primary contact can be called on to help?



Prospect Name:		
Contact information: Assuming this person is in your database, you only need enough on this report to identify the correct record.		
Contact made by: everyone involved with the call.		
Staff:		
Volunteer:		
Date of Contact: When the call took place		
Type: How the contact happened:		
Phone CallOther (Describe)		
LetterMeeting		
Purpose of Call: Why you set the meeting		
Informational: First meeting/qualifying prospect		
Cultivation: Have qualified/moving toward gift		
Solicitation: Meeting to ask for/negotiate about the gift		
Stewardship: Gift has been made/all steps to keep donor connected until you begin cultivation of this prospect for any		
follow-on gift		
Other (Describe)		
Pertinent Information: Any NEW information gleaned as a result of this gift		
Results of Call: What happened as a result of this call?		
Next Step: Specifically, what, who is responsible, by when?		