Prospect Clearance Process

Clearing prospects is an important process. It keeps potential donors from being approached by more than one campaigner and insures that we have identified the “best person” to make the ask. By “best person” we mean the person who has established or is in the process of establishing a relationship with the potential prospect. The process that we have identified as “best practices” is as follows:

1. Submit “prospect” information to the financial development department (FD) for approval. Prospect information can be submitted by completing the “Prospect Request Form” and emailing or faxing it to FD or by sending an email with the necessary information to FD. Campaigners may also submit prospect requests directly to their appropriate branch. To insure quick turn around, prospect requests should include the following information:
    a. Prospect Name (if business, include contact name)
    b. Address, include city and state
    c. Phone number

2. FD will review the prospect name and organization in the database. If the prospect is “cleared”, the prospect will be assigned to the requesting campaigner and approved for contact. FD will notify the branch administrative assistant accordingly. The administrative assistant will notify the campaigner and produce the donor card.

3. In some cases, two or more campaigners may request the same prospect. When this occurs, FD will consult with the appropriate executive directors to identify who the “best person” is to make the ask. The prospect will be assigned accordingly. FD will notify the branch administrative assistant of the assignment. The administrative assistant will notify the campaigner and produce the donor card.

4. In the event a donor wishes to make a gift to two or more branches, one campaigner will be assigned to make the request on behalf of those branches. FD will notify the branch administrative assistant of the assignment. The administrative assistant will notify the campaigner and produce the donor card.