PROSPECT MANAGEMENT SYSTEM

The Executive Director of the Foundation will be responsible for managing prospects for Rochester Community Schools and responsible for managing planned giving prospects for the district. The staff is encouraged to assist in developing strategies and in the cultivation/solicitation process.

The following procedures will be followed in accordance with policy 7233, Prospect Management System.

1. Identifying Prospects – any prospect identified for projects with the Rochester Community Schools is to be directed to the Executive Director of the Foundation, who in cooperation with CORE (Creating Opportunities for Revenue Enhancement) will assure that the prospect is entered into the database system and is handled appropriately.

2. Screening Prospects – once prospects are entered into the system, they will be screened to determine if they are viable prospects, and if so, match them with possible appropriate project(s). One result of screening will be the assignment of the prospect to a school, program, or building for cultivation and appropriate solicitation.

3. Managing the Cultivation/Solicitation Process – once a prospect is deemed viable and assigned to a particular school, program, or building, a cultivation/solicitation plan will be developed by CORE to move the prospect toward the goal. At the same time, additional information will be gathered and analyzed in order to refine the goal and the plan. Regular prospect management meetings with the Executive Director and CORE and the Major Prospects/Planned Giving Committee of the Rochester Community Schools Foundation, will assure that the process continues to move according to the plan for each prospect, ending in an appropriate gift.

Approved: March 6, 2000

REGULATION

Rochester Community Schools
Rochester, Michigan 48307

Rochester Community Schools Foundation
Prospect Management System
Prospect Contact Report

Date: _____

Your Name: _____

Your Title/Affiliation: _____

■■

1.   **Prospect Name:** _____

2.   **Date of Contact:** _____

3.   **Purpose and description of contact:** _____

_____

_____

4.   **Results of contact and next steps:** _____

_____

_____

5.   **Comments:** _____

_____

_____

NOTE

The information from this report will be entered in the prospect's record.
If no record exists, the report will serve as a request to enter the prospect
into the tracking and management system. A copy of the report will
remain a permanent part of the Prospect file.