THE ABCs OF PROSPECTING

A PROSPECT PRIORITIZATION WORKSHEET

A wealthy prospect is not necessarily a good prospect. Before deciding where to invest your fundraising time, slow down and look beyond capacity. The ABCs of Prospecting help you evaluate potential donors through three questions, in this order:

A – AFFILIATION

Can we reach them? Is there a credible way for your organization to begin a relationship with this person or institution?

B – BELIEF

Do they believe in this? Is there evidence they care about the problem you are trying to solve, the change you want to create, or the values behind your work?

C – CAPACITY

What might they be able to do? If alignment and relationship exist, what level of financial investment might reasonably be possible?

The order matters. But belief is the heart of it. Capacity can tell you the possible size of a gift. It cannot tell you why that gift would happen.

PART ONE: EVALUATE YOUR PROSPECTS

Choose 5–10 prospects currently in your pipeline—or people and institutions your team is considering pursuing. For each one, work through A, B, and C in order.

A — AFFILIATION: Is there a credible way in?

Affiliation doesn't mean you already have a relationship. It simply means there is a legitimate way for one to begin.

Consider:

- Do we already have a relationship with this prospect?
- Does a board member, donor, staff member, community partner, or funder know them?
- Is there someone who could credibly introduce us?
- Have they interacted with our organization before?
- Is there an open application or RFP?
- Is there another legitimate reason for us to introduce ourselves?

For each prospect, record:

Our affiliation: _____

Potential connector or way in: _____

Affiliation strength:

□ Strong — We have an existing relationship or clear path to an introduction.
□ Emerging — We have a credible way to begin building a relationship.
□ Weak — We currently have little or no meaningful connection.

B — BELIEF: Do they care about what we care about?
Spend the most time here. Don't ask whether this prospect could fund your organization. Ask whether you have reason to believe they care about what your organization is trying to make possible.

Consider:
- What problem do they appear to care about?
- What do they believe should be different in the world?
- What causes, communities, or issues have they supported before?
- Where do their stated values or priorities overlap with ours?
- What have their giving, leadership, public statements, or actions demonstrated?
- Is their interest specifically relevant to our work, or are we making assumptions based on wealth, geography, personal connections, or broad funding categories?
- If we met tomorrow, what could we genuinely talk about that we both care about?

For each prospect, record:
The belief we may share:_____
Evidence of alignment: _____
What we still need to learn: _____

Belief alignment:
□ Strong — We have clear evidence that this prospect cares about the problem, outcome, or values central to our work.
□ Emerging — There are promising signs of alignment, but we need to learn more.
□ Unknown — We don't yet have enough information to know what they believe.
□ Misaligned — Their interests or values do not meaningfully align with the work.

C — CAPACITY: What might they reasonably be able to do?
Only after considering affiliation and belief should you assess capacity. Capacity helps you understand the possible size of an eventual gift. It does not tell you whether someone will give.

Consider:
- What do we know about their previous philanthropy?
- What size gifts have they made to us or other organizations?
- For an institution, what are its typical grant ranges?
- What do reliable wealth indicators suggest?
- What level of investment might be appropriate if the relationship develops?
- How confident are we in our information?

For each prospect, record:
Estimated gift range: $_____ to $_____
Evidence: _____

Capacity:
□ High
□ Medium
□ Low
□ Unknown

Confidence in this estimate:
□ High
□ Medium
□ Low

connection collaborative

PART TWO: BUILD YOUR ABC PROSPECT MAP

PROSPECT	A: AFFILIATION	B: BELIEF	C: CAPACITY	WHAT DO WE NEED TO LEARN?	NEXT MOVE

PART THREE: DECIDE WHAT HAPPENS NEXT

Don't turn the ABCs into a mathematical score. A prospect with enormous capacity but little evidence of belief is not necessarily more valuable than a prospect with moderate capacity who deeply believes in your mission. **Instead, use what you've learned to determine the appropriate next step.**

PRIORITIZE NOW

Strong belief + viable affiliation: there is meaningful alignment and a credible opportunity to deepen the relationship.

Next step: Move toward relationship-building, cultivation, or an appropriate funding conversation.

LEARN MORE ABOUT BELIEF

Affiliation exists + belief is unknown or emerging: you can reach this person, but you don't yet know enough about what matters to them.

Next step: Don't pitch. Get curious. Learn about their interests, values, experiences, and priorities.

FIND A WAY IN

Strong belief + weak affiliation: you have compelling reason to believe there is alignment, but no relationship yet.

Next step: Look for connectors, shared networks, events, open opportunities, or a thoughtful reason to introduce yourself.

CULTIVATE OVER TIME

Belief exists + relationship is developing: there may be potential here, but fundraising does not need to move immediately toward an ask.

Next step: Continue creating opportunities for the prospect to experience the mission, understand the impact, and build relationships with the people behind the work.

DEPRIORITIZE

Little evidence of belief or meaningful alignment: Capacity alone is not a compelling reason to invest significant fundraising time.

Next step: Redirect your energy toward prospects with greater potential for genuine partnership.

ONE FINAL QUESTION:

If you weren't allowed to ask this prospect for money, what conversation would you want to have with them?