

Alumni Volunteer Referral Organizer

Instructions

Alumni are often the best judges for their peers' likelihood to give. The following referral form will help advancement shops tap into their volunteers' networks to surface strong prospects.

Peer Referral Form							Your Name: _____								
Name: _____				Email: _____											
Phone Number: _____				Employer: _____											
Address: _____				Job Title: _____											
<p>How strong is this individual's affinity to the institution? <i>(Think about whether he or she thinks fondly of the institution, is still in touch with faculty, staff, or students at the institution, stays connected to the institution via events or volunteering, etc.)</i></p> <p style="text-align: center;"> Low Affinity High Affinity </p> <p style="text-align: center;"> 1 2 3 4 5 </p> <p>Notes: _____</p> <hr/>															
<p>In what way might he or she want to get involved with the institution? <i>(e.g., Volunteering, board service, council services, student mentoring, job shadowing, connecting with faculty, access to events, etc.)</i></p> <p>Interest Areas: _____</p> <hr/>															
<p>How strong is this individual's ability to donate to the institution? <i>(Think about his or her wealth, philanthropic spirit, job, place in career, family considerations, etc.)</i></p> <p style="text-align: center;"> Low Capacity High Capacity </p> <p style="text-align: center;"> 1 2 3 4 5 </p> <p>Notes: _____</p> <hr/>															
<p>Should a gift officer visit this individual?</p> <p style="text-align: center;"> No, definitely not Yes, absolutely </p> <p style="text-align: center;"> 1 2 3 4 5 </p>															

Consider organizing the results of this worksheet in a spreadsheet to quickly sort through highly rated prospects.

Alumni Volunteer	Prospect Name	Email	Phone	Address	Employer	Job Title	Affinity Level	Affinity Notes	Interest Areas	Capacity Level	Notes	Gift Officer Visit	Notes
Jane A.	Jack Smith	jsmith@gmail.com	419-555-2990	XXXX	Johnson & Wilson	Partner	3	Recruits from university	Board service	5	Kids out of college, great job	4	XXX

Source: EAB interviews and analysis.