

Fundraising Call Sheet - Filled Example

Completed example: Jordan Lee for Riverside Council | Prepared September 15, 2026

A completed fundraising call-time and prospect-management example showing preparation, asks, outcomes, follow-up, and pipeline forecasting.

Call-time block

Field	Completed entry
Date / time	September 16, 2026 - 4:30-6:00 PM
Candidate	Jordan Lee
Call-time manager	Lena Brooks
Block goal	\$7,500 pledged / 24 completed calls
Completed	22 calls / \$8,200 pledged / \$5,700 collected

Completed call sheet

Prospect	Relationship / context	Ask	Outcome	Next action
Avery Thompson	Former community-board colleague; donated \$1,000 in prior race.	\$2,500	\$2,500 pledged	Send secure link tonight; call Sept. 18 if unpaid
Morgan Ellis	Local business owner; attended launch.	\$1,000	\$750 paid	Thank-you call Sept. 17
Taylor Brooks	Neighbourhood association volunteer.	\$500	Wants to host 8-person event	Finance lead calls Sept. 17
Casey Martin	Friend of candidate; no prior political giving.	\$750	No answer	Try Sept. 19 at 12:30
Jamie Roy	Policy supporter; asked about tax plan.	\$1,000	\$500 pledged	Send policy summary and payment link

Pipeline forecast

Stage	Prospects	Value	Expected value
Research / uncontacted	48	\$41,000	\$4,100
Attempted	31	\$28,500	\$5,700
Conversation	18	\$22,000	\$11,000
Pledged	12	\$13,400	\$13,400
Collected	27	\$26,850	\$26,850

Call-time coaching note

Jordan's strongest calls were concise and included a specific reason for the amount. Avoid extended policy discussion before making the ask; schedule a separate follow-up where needed.

Training note: This is a fictional completed example. Campaigns should replace all entries with their own facts and verify jurisdiction-specific legal, finance, privacy, and election requirements with current official sources.