



Prospect Pipeline Tracker

A printable companion to the fundraising spreadsheet for prospect stages and next actions.

Campaign	
Owner	
Date / milestone	
Review date	

Purpose and operating standard

Use for weekly prospect review or candidate call-time preparation.

Use verified information, assign a named owner, protect personal data, and confirm jurisdiction-specific legal or election requirements with the authorized campaign official or election authority.

Stage definitions

Stage	Definition
Research	Basic relationship/capacity/context being verified.
Qualified	Appropriate prospect with a reason and ask range.
Contacted	Outreach made; disposition recorded.
Ask scheduled	Specific conversation and owner/date set.
Asked	Specific amount requested.
Committed	Amount/method confirmed; not yet received.
Received	Funds received and records checked.

Pipeline

Prospect	Stage	Ask	Owner	Next action/date	Committed	Received

Weekly review

- Which prospects are stalled without a specific next action?
- Which commitments need follow-up?



- Which relationships should be stewarded without another ask?
- Are records complete and compliant?



Sources and local adaptation

Confirm all election, finance, accessibility, privacy, and voting-information requirements using current official sources. Record the source and verification date before operational use.

Elections Canada - candidate and political financing guidance
<https://www.elections.ca/>

U.S. Federal Election Commission - candidate and committee guidance
<https://www.fec.gov/help-candidates-and-committees/>

National Democratic Institute - Campaign Skills Handbook
https://www.ndi.org/sites/default/files/Campaign%20Skills%20Handbook_EN.pdf

CISA - election security resources
<https://www.cisa.gov/topics/election-security/election-security-resource-library>