



# Prospective Client Questionnaire

## Stewardship Advocates

### Capital Campaign Services

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#### PROSPECTIVE CLIENT INFORMATION - PERSON SUBMITTING THE FORM

Name

Title

E-mail

Phone

Position

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#### PARISH OR ORGANIZATION INFORMATION

Name of parish or  
organization

Address

website URL

Number of pledging  
households

Additional affiliated  
households

Annual parish budget

Income from stewardship  
or annual giving

Festival or signature event  
income

Length of time priest or  
executive director in place?

Describe any additional  
staff. Full or part time?

Written plan for the future  
of the parish or  
organization?

Does the organization or  
parish carry debt? How  
much?

Project description

Status of project as regards  
General Assembly or  
governing board or parish  
council?

How much money needs to  
be raised?

When was the last capital  
effort? How much raised?

What committee(s) or  
leadership is in place?

Has fund raising begun?

Any outstanding pledges  
from earlier project(s)?

Your perception of major  
challenges to a successful  
effort

**Ideally, when would you  
want to start?**

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**OTHER SERVICES?**

The campaign may be the highest priority, but any interest in other strategies of organization development?

<b>Services</b>	<b>strategic planning</b>
	<b>board development</b>
	<b>volunteer management</b>
	<b>personal coaching for leadership</b>
	<b>personal coaching for management</b>
	<b>an endowment program</b>
	<b>an ongoing major gifts program</b>
	<b>church growth/evangelization</b>
	<b>stewardship or annual giving program</b>

Tell us about any other services you may need and how we can best serve you:

**Description**

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**HOW DID YOU HEAR ABOUT US?**

<b>Method</b>	<b>referral</b>	<b>e-newsletter</b>
	<b>web search</b>	<b>Twitter</b>
	<b>LinkedIn</b>	<b>Facebook</b>
	<b>other</b>	