



Prospective Client Questionnaire

Stewardship Advocates

Major Gifts Program

PROSPECTIVE CLIENT INFORMATION - PERSON SUBMITTING THE FORM

Name

Title

E-mail

Phone

Position

PARISH OR ORGANIZATION INFORMATION

Name of parish or organization

Address

website URL

Number of pledging households

Additional affiliated households

Annual parish budget

Length of time priest or
executive director in place?

Describe any additional staff.
Full or part time?

Is there a written plan for the
future of the parish or
organization?

What is your history regarding
large gifts to the parish?

Is there a facilities committee
that identifies long term deferred
maintenance projects?

Is there an existing planned
giving program (bequests and
wills)?

If you were to receive several
large gifts how would you use the
funds?

Where does your governing
board or parish council stand on
this proposed initiative?

Who is leading this initiative?

Ideally, when would you want to start?

OTHER SERVICES?

A major gifts program may be the present highest priority, but any interest in other strategies of organization development?

- | | |
|-----------------|---|
| Services | capital campaign |
| | board development |
| | volunteer management |
| | personal coaching for leadership |
| | personal coaching for management |
| | strategic planning |
| | endowment program |
| | church growth/evangelization |
| | stewardship or annual giving program |

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

Description

HOW DID YOU HEAR ABOUT US?

- | | | |
|---------------|-------------------|---------------------|
| Method | referral | e-newsletter |
| | web search | Twitter |
| | LinkedIn | Facebook |
| | other | |