



Prospective Client Questionnaire

Stewardship Advocates

Stewardship or Annual Giving 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

Income from stewardship or annual giving

Festival or signature event income

Average pledge, if known

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?

What are the three largest gifts of any variety received in the last few years?

Are you on a dues or membership system or individual family pledge system? How long on pledge system?

Have you been running a deficit?

If you had an ongoing increasing infusion of unrestricted funds, how should they be spent?

Describe how the stewardship or annual giving effort has been done over the past few year

Status of this initiative as regards the governing board or parish council?

How much would you hope to increase stewardship or annual giving this year?

What committee(s) or leadership is in place?

Ideally, when would you want to start?

OTHER SERVICES?

Stewardship or annual giving may be the highest priority, but any interest in other strategies of organization development?

Services

strategic planning
board development
volunteer management
personal coaching for leadership
personal coaching for management
an endowment program
an ongoing major gifts program
church growth/evangelization
capital campaign

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	