



Prospective Client Questionnaire

Stewardship Advocates

Strategic Planning

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?

Please describe previous efforts
in planning. When?

Does a written plan exist?

Why do you feel a professional
strategic planning process needs
to be undertaken?

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

Is there a committee or
leadership in place?

What critical issues do you feel
the parish or organization will
face over the next two years?

What critical issues do you feel the parish or organization will face over the next ten years?

Ideally, when would you want to start?

OTHER SERVICES?

Strategic planning may be the 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 |
| | an endowment program |
| | an ongoing major gifts 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 | |