



Prospective Client Questionnaire

Stewardship Advocates

Volunteer Management 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?

How many volunteers work in
the parish or organization?

Please describe any purposefully
designed efforts in volunteer
management. When?

What are your key challenges as
regards volunteers?

Status of the proposed project as
regards a professional volunteer
management program?

Is there a committee or
leadership in place for this
project?

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?

Parish council or board development may be the highest priority right now, but any interest in other strategies of organization development?

Services	capital campaign
	strategic planning
	board development
	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	