



(Please rate 1-5, 1 being very little understanding; 5 being excellent understanding)

- \_\_\_\_\_ Pastor
- \_\_\_\_\_ Principal
- \_\_\_\_\_ President
- \_\_\_\_\_ Parish Council
- \_\_\_\_\_ Parish Staff
- \_\_\_\_\_ Finance Committee
- \_\_\_\_\_ Faculty/Staff
- \_\_\_\_\_ Board
- \_\_\_\_\_ Parishioners
- \_\_\_\_\_ Parents
- \_\_\_\_\_ Alumni

12. Number of families in the parish: \_\_\_\_\_

13. Number of students in the school: \_\_\_\_\_

14. Amount of parish weekly collections: \_\_\_\_\_

15. Number of parish families who give on a regular basis: \_\_\_\_\_

16. Amount of Annual Fund: \_\_\_\_\_

17. Number of donors to the Annual Fund: \_\_\_\_\_

18. Number of donors who could afford a \$1000 gift each year: \_\_\_\_\_

19. Largest gift you have received in the past 5 years: \_\_\_\_\_

20. Year of last long-range planning/accreditation process: \_\_\_\_\_

21. Please check the items here that you successfully have in operation:

- \_\_\_ Development office
- \_\_\_ Mission Statement

- \_\_\_ Vision Statement
- \_\_\_ Database of names
- \_\_\_ Newsletter to all constituents
- \_\_\_ Long-Range Plan for the Parish
- \_\_\_ Organized Stewardship effort
- \_\_\_ A Core Team to guide the development efforts
- \_\_\_ Logo
- \_\_\_ Brochure on the institution
- \_\_\_ Welcome packet
- \_\_\_ Long-Range, Strategic Plan for the School
- \_\_\_ Alumni Association
- \_\_\_ Annual Giving Drive
- \_\_\_ Written Plan for the Development Office
- \_\_\_ Master Plan for Fund-raising
- \_\_\_ Endowment: How much in corpus? \_\_\_\_\_
- \_\_\_ Planned/Deferred Giving Program
- \_\_\_ Memorial Gift Program
- \_\_\_ Major Gift Program
- \_\_\_ Excellent development volunteers How many? \_\_\_\_\_

22. When was your last capital campaign? \_\_\_\_\_

- Are you planning one in the near future? \_\_\_\_\_ When? \_\_\_\_\_
- For what purpose(s)? \_\_\_\_\_

23. How would you define the leadership of your institution: (Please check if appropriate.)

Position: \_\_\_\_\_

- \_\_\_ Visionary
- \_\_\_ Living day to day
- \_\_\_ Seeks advice and consultation  
consultation
- \_\_\_ Willing to spend money to make money
- \_\_\_ Wants a "quick fix"
- \_\_\_ Willing to develop institution for the future
- \_\_\_ Team management
- \_\_\_ Boss management

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24. Please list the main 5 issues/challenges that you face over the next 1-5 years.

- 1.
- 2.
- 3.
- 4.
- 5.

25. Please check the areas that you feel you need to address at this time.

- \_\_\_ Long-Range Planning for a School
- \_\_\_ Long-Range Planning for a Parish
- \_\_\_ Strategic Plan for Development  
Students
- \_\_\_ Capital Campaign Feasibility
- \_\_\_ Development Education
- \_\_\_ Total Stewardship
- \_\_\_ Alumni
- \_\_\_ Annual Fund
- \_\_\_ Attracting New
- \_\_\_ Capital Campaign Implementation
- \_\_\_ Total Quality Management
- \_\_\_ Jumpstarting a Campaign

26. On a scale from 1-10 (10 being the highest interest level and 1 being the lowest), please indicate your interest in exploring the possibilities of working with a Catholic consulting company?

1      2      3      4      5      6      7      8      9      10

**Additional Comments:**

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