

CONFIDENTIAL

INFORMATION FORM

FAX 888-853-1110 or EMAIL to jhewett@hewettconsulting.com

Organization Name _____

Address _____ City _____ State _____ Zip _____

Telephone _____ Fax _____ Website: _____

Executive Director _____ E-Mail _____

Other Key Staff: _____ E-Mail _____

_____ E-Mail _____

Mission Statement _____

Funding Committee Chair: Name: _____ E-Mail: _____ Phone: _____	Person Completing This Form: Name: _____ E-Mail: _____ Phone: _____
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Primary Service Area Zip Code(s): _____

Fiscal Year _____ Last Audited Financial Statement _____

YOUR PROJECT:

What is the project you're considering?

- | | |
|--|-------------------------------------|
| <input type="checkbox"/> Expansion | <input type="checkbox"/> Relocation |
| <input type="checkbox"/> Debt Retirement | <input type="checkbox"/> Renovation |
| <input type="checkbox"/> Parking | <input type="checkbox"/> Other |

Brief Description of Project: _____

Estimated Cost of Project: _____

Expected Timing of Capital Campaign: _____

Individual Donor Data

2007	2008	2009
New	New	New
Renewed	Renewed	Renewed
LYBUNTS	LYBUNTS	LYBUNTS
SYBUNTS	SYBUNTS	SYBUNTS

Corporate Donor Data

2007	2008	2009
New	New	New
Renewed	Renewed	Renewed
LYBUNTS	LYBUNTS	LYBUNTS
SYBUNTS	SYBUNTS	SYBUNTS

Foundation Gifts Data

2007	2008	2009
New	New	New
Renewed	Renewed	Renewed
LYBUNTS	LYBUNTS	LYBUNTS
SYBUNTS	SYBUNTS	SYBUNTS

Income / Expense Data

2007	2008	2009
Operating Income	Operating Income	Operating Income
Operating Expenses	Operating Expenses	Operating Expenses
Surplus	Surplus	Surplus
(Deficit)	(Deficit)	(Deficit)

Total Endowment: \$ _____ Restricted \$ _____ Unrestricted \$ _____

Sources of 2009 Operating Income

Pledged Contributions	\$_____	(%)
Unpledged Contributions	\$_____	(%)
Earned Income	\$_____	(%)
Draw on Endowment	\$_____	(%)
Other	\$_____	(%)
TOTAL 2009 BUDGET INCOME	\$_____	(100%)
TOTAL 2009 BUDGET EXPENSES	\$_____	
Overage	\$_____	
(Deficit)	(\$_____)	

2009 Gift Levels (Please indicate number of gifts from all sources at each level):

(\$1-\$499)	_____	(\$5,000-\$7,499)	_____
(\$500-\$999)	_____	(\$7,500-\$9,999)	_____
(\$1,000-\$1,999)	_____	(\$10,000-\$14,999)	_____
(\$2,000-\$2,999)	_____	(\$15,000-\$19,999)	_____
(\$3,000-\$3,999)	_____	(\$20,000-\$24,999)	_____
(\$4,000-\$4,999)	_____	(\$25,000+)	_____
		No Recorded Gift	_____

2009 Operating Income by Month:

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC

DEBT:

Amount of Current Debt: _____	Interest Rate(s): _____
Monthly Debt Payment: _____	Cause of Debt: _____
When will debt be retired? _____	

Please list your two most recent capital campaigns:

Year _____

Year_____

Project: _____
 # of pledges: _____
 Total pledged: \$_____

Project: _____
 # of pledges: _____
 Total pledged: \$_____

Total received: \$_____

Total received: \$_____

Outside Consultant Used? _____

Outside Consultant Used? _____

Does your organization promote planned giving? _____If yes, describe the program:_____

What is your procedure for receiving gifts of stock or other negotiable securities? _____

What financial appeals are typically made in addition to the annual fund? _____

In 2009, what was the total given to these special appeals? _____

Please list all designated gifts of \$5,000 or more for additional projects or causes not listed above over the past three years:

2007	2008	2009