

CONFIDENTIAL

CHURCH INFORMATION FORM

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

Church/Parish Name _____

Address _____ City _____ State _____ Zip _____

Telephone _____ Fax _____ Website: _____

Pastor _____ E-Mail _____

Administrator/Business Manager: _____ E-Mail _____

Denominational Affiliation _____

Other Affiliations: _____

Funding Committee Chair: Name: _____ E-Mail: _____ Phone: _____	Person Completing This Form: Name: _____ E-Mail: _____ Phone: _____
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Theological Profile (check all that apply):

- | | | |
|---|---|---|
| <input type="checkbox"/> Fundamental | <input type="checkbox"/> Moderate | <input type="checkbox"/> Ecumenical |
| <input type="checkbox"/> Conservative | <input type="checkbox"/> Progressive | <input type="checkbox"/> Charismatic |
| <input type="checkbox"/> Traditional | <input type="checkbox"/> Liberal | <input type="checkbox"/> Contemporary |
| <input type="checkbox"/> Evangelical | <input type="checkbox"/> Ecumenical | <input type="checkbox"/> Seeker-Sensitive |
| <input type="checkbox"/> Non-Denominational | <input type="checkbox"/> Denominational | <input type="checkbox"/> Other _____ |

Worship Style (check all that apply):

- | | | |
|---------------------------------------|-------------------------------------|--------------------------------------|
| <input type="checkbox"/> Contemporary | <input type="checkbox"/> Blended | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Traditional | <input type="checkbox"/> Liturgical | <input type="checkbox"/> Other _____ |

Primary Ministry 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: _____

Membership Data

2007	2008	2009
Additions	Additions	Additions
Deletions	Deletions	Deletions
Resident Members	Resident Members	Resident Members
Total Members	Total Members	Total Members
Total Households	Total Households	Total Households
Total Giving Units	Total Giving Units	Total Giving Units

Average Attendance Data

2007	2008	2009
Sep.-May Worship	Sep.-May Worship	Sep.-May Worship
Summer Worship	Summer Worship	Summer Worship
Sep.-May Church School	Sep.-May Church School	Sep.-May Church School
Summer Church School	Summer Church School	Summer Church School

Income / Expense Data

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

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

Does the church conduct an annual pledge drive? _____ If yes, when? _____

Does the church use pre-printed offering envelopes? _____

If yes, how are they distributed? _____

Does the church provide regular statements of giving? _____

If yes, how are they distributed? _____

Sources of 2009 Budget Income

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

2009 Giving Units:

(\$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 _____
	Total Giving Units _____

2009 Budget 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 the church's 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 the church promote planned giving? _____If yes, describe the program:_____

What is the church's procedure for receiving gifts of stock or other negotiable securities?

Who has access to individual giving records? _____

What financial appeals are typically made in addition to the regular budget? (e.g., mission offerings, youth projects, denominational offerings):_____

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