Church Information

Questionnaire

**Introduction**

The information requested in this vital information questionnaire (“Questionnaire”) will be the foundation for creating the expansion plan (also referred to as the Facility Goal report in Phase 1) as well as the Loan Package (Phase 3) documentation. It is vitally important, therefore, to provide complete and accurate information in this Questionnaire. Please contact Scott McLean at Development Advisors, LLC at 303-534-3344 x103 if you have any questions. Note: to check a box, double-click on the box and select choice from “Default value”. **Please insert data using blue ink.** Thank you.

**Section I**

**Church Information**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **1.** Legal Corporate Name | | | | | |  | | | | | | | | | | | | | | | | | | |
| **2.** Known as (dba) | | | | | |  | | | | | | | | | | | | | | | | | | |
| **3.** Physical address | | | | | |  | | | | | | | | | | | | | | | | | | |
| **4.** Mailing address | | | | | |  | | | | | | | | | | | | | | | | | | |
| **5.** Phone | | |  | | | | | Fax | | | |  | | | | | | | | Web site | | |  | |
| **6.** Business office hours | | | | | | |  | | | | | | | | | | | | | | | | | |
| **7.** Denominational affiliation, if applicable: | | | | | | | | | | | | |  | | | | | | | | | | | |
| Name and location of denomination headquarters (as applicable): | | | | | | | | | | | | | | | | | | | | | | | | |
| National | | | | |  | | | | | | | | | | | | | | | | | | | |
| State | | | | |  | | | | | | | | | | | | | | | | | | | |
| Local | | | | |  | | | | | | | | | | | | | | | | | | | |
| **8.** Approval Entity (Ownership and/or Financing) | | | | | | | | | |  | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | |
| **9.** Contact for questions regarding this Questionnaire: | | | | | | | | | | | | | | | | | | | | | | | | |
| Name | | | |  | | | | | | | | | | | | | | | Position/Title | | | | |  |
| **10.** Please provide the names of all persons involved in completing this Questionnaire: | | | | | | | | | | | | | | | | | | | | | | | | |
| Name | | | |  | | | | | | | | | | | | | | | Position/Title | | | | |  |
| **Name** | | | |  | | | | | | | | | | | | | | | Position/Title | | | | |  |
| **Name** | | | |  | | | | | | | | | | | | | | | Position/Title | | | | |  |
| **Name** | | | |  | | | | | | | | | | | | | | | Position/Title | | | | |  |
| **11.** Provide a brief history of the church from its organization to the present. *Please include* the date and place organized, first meeting date, number of charter members, property acquisitions, major building projects, mission churches, services, and other significant events. Attach an additional sheet, if necessary, and entitle the additional sheet “Church History.” | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | |
| **12.** Describe the organization and management structure of the church, the method of electing members of any governing body and their term of office, the method of approving major transactions and the title of the person who has the authority to contract for property or bind the church to financial obligations. Attach an additional sheet, if necessary, and entitle the additional sheet **“**Organization and Governance.**”** | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | |
| **13.** Please provide a copy of all printed church documents that are routinely provided to congregants including copies of church brochures, the weekly bulletin, monthly newsletter, quarterly reports, etc. | | | | | | | | | | | | | | | | | | | | | | | | |
| **14.** Does the church have a written **Mission Statement**? | | | | | | | | | | |  | | | | Yes | |  | | | | No | | | |
| If yes, please write it below. If necessary, please attach additional explanation on a separate sheet titled “Mission Statement.” | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | |
| **15.** Does the church have a written **Vision Statement**? | | | | | | | | | | |  | | | | Yes | |  | | | | No | | | |
| If yes, please write it below. If necessary, please attach additional explanation on a separate sheet titled “Vision Statement.” | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | |
| **16.** Does the church have a written **Vision** for its proposed **expansion**? | | | | | | | | | | |  | | | | Yes | |  | | | | No | | | |
| If yes, please write it below. If necessary, please attach additional explanation on a separate sheet titled “Expansion Vision.” | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | |
| **17.** Does the church currently operate or intend on starting a school? | | | | | | | | |  | | | | | Yes | |  | | No | | | | If the church has a school already, please go to Section VIII (page 27), otherwise, please elaborate on your future vision below: | | |
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**Section II**

**Membership**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| 1. Please describe the **demographic profile** of your congregation. Please consider age, income, marital status, average family size, number of children, etc. in your descriptions. You may need to articulate this into several sub-demographic groupings. Please provide the percentage that each of these groups is to the total congregation. | | | | | |
|  | | | | | |
| **2.** Do you have **map locations** for each member/attendee’s residence? | |  | Yes |  | No |
| If yes, please provide this map. If not, please provide us the address of each church giving unit and/or each attendee (recently updated) in an Excel spreadsheet. | | | | | |
| **3. Church Management App**. Do you have all of your members inputted into a church management software application such as Church Community Builder? If so, please provide a printout of the key metrics including how many members there are and the percentage of members to attenders. | | | | | |
| **4. New Member Classes**. Is becoming a member diligently pursued by the church? In what ways does your church promote membership? What do you call your membership classes? How frequently do they occur? Who leads them? What are the criteria to become a member? | | | | | |
| **5. Adult Bible Study.** When do these classes occur on Sundays? Are there multiple classes simultaneously? How many adults typically participate? Will this grow substantially in the future? | | | | | |
| **6. Small Groups**. How many small groups does your church have? Who is in charge of small groups? What is this person’s title? Is there a specific small group scope mentioned in this person’s job description? If so, what is the scope? What percentage of your church’s members/attenders are in small groups? Do you have a list of small group leaders? Is there a common agenda? How is the agenda created? Is it tied to preaching from the pulpit? | | | | | |
| **7. Outward Focus.** Please describe the ministry outreach to the local community including the specific names and leaders/volunteers. What activities or events did your church organize/lead in its community during the past 12 months? | | | | | |
| **8.** Please list possible building/relocation **committee** **candidates**. The best candidate is someone who has useable skills or who has a passion for the church expansion as evidenced by a willingness to donate significant financial resources to such a project. It is helpful to have persons with development, construction and financial experience. It is also helpful to have individuals that own their own businesses. Consider only candidates that are good team players. | | | | | |
| Member’s **Name** |  | | | | |
| Reason to be on committee |  | | | | |
| Member’s **Name** |  | | | | |
| Reason to be on committee |  | | | | |
| Member’s **Name** |  | | | | |
| Reason to be on committee |  | | | | |
| **9.** Please describe any close relationships that members of your church have with **local municipal leaders**. | | | | | |
| Member’s Name |  | | | | |
| **Connection** Name |  | | | | |
| Member’s Name |  | | | | |
| **Connection** Name |  | | | | |
| **10.** Please describe any **close relationships** that senior staff or members of your church have with commercial or church architects, commercial or church general contractors, church lenders, etc. | | | | | |
| Member’s Name |  | | | | |
| **Connection** Name |  | | | | |
| Background, Skill Set |  | | | | |
| Member’s Name |  | | | | |
| **Connection** Name |  | | | | |
| Background, Skill Set |  | | | | |
| Member’s Name |  | | | | |
| **Connection** Name |  | | | | |
| Background, Skill Set |  | | | | |

**Section III**

**Attendance** and **Financial Data**

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| **1.** How many **seats** does your sanctuary have? | | | | | | | | | | | | | | | | | | | | | | | | | | |  | | | | | | What **percentage** of occupancy do you consider it to be “full”? | | | | | | | | | | | | | | | | | | | | | | | | | | |  | |
| **2.** How many **services** does the church offer during the week? | | | | | | | | | | | | | | | | | | | | | | | | | | |  | | | | | | Below, please indicated the day, service time and average attendance (adult / kids) below: | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Day | | | | | |  | | | | | | | | | | | | | | | | | Time | | | | | | | |  | | | | | | | | | | | | | | Average Attendance | | | | | | | | | | |  | | | | |
| Day | | | | | |  | | | | | | | | | | | | | | | | | Time | | | | | | | |  | | | | | | | | | | | | | | Average Attendance | | | | | | | | | | |  | | | | |
| Day | | | | | |  | | | | | | | | | | | | | | | | | Time | | | | | | | |  | | | | | | | | | | | | | | Average Attendance | | | | | | | | | | |  | | | | |
| Day | | | | | |  | | | | | | | | | | | | | | | | | Time | | | | | | | |  | | | | | | | | | | | | | | Average Attendance | | | | | | | | | | |  | | | | |
| Day | | | | | |  | | | | | | | | | | | | | | | | | Time | | | | | | | |  | | | | | | | | | | | | | | Average Attendance | | | | | | | | | | |  | | | | |
| **3.** Do you operate other remote **video venues** in the church? | | | | | | | | | | | | | | | | | | | |  | | | | | Yes | | | | | |  | | No | | | If so, please indicate the day, service time and average attendance below: | | | | | | | | | | | | | | | | | | | | | | | | | |
| Day | | | | | |  | | | | | | | | | | | | | | | | | Time | | | | | | | |  | | | | | | | | | | | | | | Average Attendance | | | | | | | | | | |  | | | | |
| Day | | | | | |  | | | | | | | | | | | | | | | | | Time | | | | | | | |  | | | | | | | | | | | | | | Average Attendance | | | | | | | | | | |  | | | | |
| *If so, please describe in detail here:* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **4.** How many **on-site parking** spaces does your church have? | | | | | | | | | | | | | | | | | | | | | | | |  | | | | | | | | How many **off-site parking** spaces does the church have access to? | | | | | | | | | | | | | | | | | | | | | | | | | | | |  | |
| **5.** Please describe the parking transition between services—the availability of parking spaces after earlier services are completed and as subsequent services are about to begin. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| **6.** Provide attendance data for the church over the last three years and for the current year-to-date, as applicable. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Year | | | | | | | | | | | | | Regular  Attendees | | | | | Average Adult Worship Service Attendance | | | | | | | | | | | | Average Sunday School or Bible Study Attendance | | | | | | | | | | | | | | | Number of Small Groups | | | | | | | | | Families Regularly Contributing  *And*  # of Giving Units | | | | | | | |
| Current Fiscal Year: | | | | | | | | | | | | |  | | | | |  | | | | | | | | | | | |  | | | | | | | | | | | | | | |  | | | | | | | | | Families Contributing | | | | |  | | |
|  | | | | |  | | |  | | | | | Giving Units | | | | |  | | |
| Mo | | | | |  | | | Mo | | | | |
| 20 | | | |  | | | | | |  | | |  | | | | |  | | | | | | | | | | | |  | | | | | | | | | | | | | | |  | | | | | | | | | Families Contributing | | | | |  | | |
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| 20 | | | |  | | | | | |  | | |  | | | | |  | | | | | | | | | | | |  | | | | | | | | | | | | | | |  | | | | | | | | | Families Contributing | | | | |  | | |
|  | | | | | | | | | Giving Units | | | | |  | | |
| 20 | | | |  | | | | | |  | | |  | | | | |  | | | | | | | | | | | |  | | | | | | | | | | | | | | |  | | | | | | | | | Families Contributing | | | | |  | | |
|  | | | | | | | | | Giving Units | | | | |  | | |
| Is any of the data provided above estimated (versus actual counts)? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | Yes | | | | No | | | |
| If yes, indicate which categories: | | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **7.** Explain significant increases or decreases, if any, in membership/attendance as reported in the table above: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| **8.** Top five General Fund contributor amounts for last fiscal year by dollar amount: | | | | | | | | | | | | | | | | | | | | | | | a. $ | | |  | | | | | | | | | | | | | | | | | | | | | | | b. $ | | | | | |  | | | | | | |
| c. $ | | | |  | | | | | | | | | | | | | | | d. $ | | | | | |  | | | | | | | | | | | | | | | | | | | | e. $ | | | | | |  | | | | | | | |
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| **9.** Does the church currently receive, from one or a few members, substantial contributions that may not be received in the future? If yes, please describe: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| **10.** Does the church have specific members identified that have the potential to make substantial gifts to the church in the future? If yes, please describe: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| **11.** **Church General Fund:** When does the Fiscal year end (month, day)? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | |
| **12.** Please provide General Fund financial statements including income and expense (profit and loss) statements for the past three (3) fiscal years showing a specific line item break down for each category of income and expenses and a current balance sheet showing the church’s current financial positions and net worth. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **13.** Please provide a percentage breakdown of personnel costs (including all benefits) and facility costs (including debt service and property operating expenses) for each of the past three (3) fiscal years. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| **14.** Number of paid employees of the church: | | | | | | | | | | | | | | | | | | | | | | | | | | | | |  | | | | | | | |  | | | | | | | | | | | | |  | | | | | | part-time | | | | |
| **15.** State all direct and indirect remuneration paid by the church to its pastors, ministers and executive staff having management responsibility and to any officers for the preceding fiscal year in the aggregate, and state the number of individuals these figures represent. Indirect remuneration includes pension or retirement plans, insurance, and other similar benefits, or the use of the church’s assets for personal purposes. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **Pastors, Ministers, Executive Staff:** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Amount $ | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | Number of FTE’s | | | | | | | | | | | | | | | | |  | | | |
| **Officers, Directors, Trustees, Etc.:** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Amount $ | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | Number of individuals | | | | | | | | | | | | | | | | |  | | | |
| **16.** **Financial Relationships:** Who does the church bank with for its General Fund operating account, for its savings account(s), for its investment account(s), etc.? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| **17.** **Potential** **Cost Reductions:** In order to make payments for borrowed debt resources, oftentimes a church must make painful reductions in expenses, including laying off personnel, in order to make ends meet. Please describe the current expenses that the church would cut (list the categories). | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| **18.** Provide the information in the spaces below about all outstanding long-term debt (remaining term of over 12 months) and any long-term debt retired during the last five years: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **A.** **Lender** | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Original Amount $ | | | | | | | | | | | | |  | | | | | Origination date | | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | |
| Maturity Date | | | | | | | | | | | | |  | | | | | Current balance $ | | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | |
| Monthly payment $ | | | | | | | | | | | | |  | | | | | Are payments current? | | | | | | | | | | | | | | | | | | | |  | | | | Yes | | | | |  | | | | | No | | | | | | | | |
| Purpose of Loan | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| If paid in full, Date | | | | | | | | | | | | |  | | | | | Source of funds for payment | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **B.** **Lender** | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Original Amount $ | | | | | | | | | | | | |  | | | | | Origination date | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Maturity Date | | | | | | | | | | | | |  | | | | | Current balance $ | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Monthly Payment $ | | | | | | | | | | | | |  | | | | | Are payments current? | | | | | | | | | | | | | | | | | | |  | | | | Yes | | | | |  | | | | | No | | | | | | | | | |
| Purpose of Loan | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| If paid in full, Date | | | | | | | | | | | | |  | | | | | Source of funds for payment | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **C.** **Lender** | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Original Amount $ | | | | | | | | | | | | |  | | | | | Origination date | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Maturity Date | | | | | | | | | | | | |  | | | | | Current balance $ | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Monthly payment $ | | | | | | | | | | | | |  | | | | | Are payments current? | | | | | | | | | | | | | | | | | | |  | | | | Yes | | | | |  | | | | | No | | | | | | | | | |
| Purpose of loan | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| If paid in full, Date | | | | | | | | | | | | |  | | | | | Source of funds for payment | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **19.** Are there any contracts which, if terminated, would materially affect the church’s income? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | Yes | | | |  | | | | | | No | | | If yes, attach explanation on a separate sheet titled “Contingent Income.” | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **20.** Has the church had any material default during the past five years in the payment of principal, interest, or sinking fund installments on any security or indebtedness for borrowed money or in the payment of rentals under material leases with terms of 3 years or more? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | Yes | | | |  | | | | | | No | | | | | If yes, attach explanation on a separate sheet titled “Defaults.” | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **21.** Has any pastor, officer, director, trustee, or similar leader of the church, during the last five years, been convicted in any criminal proceeding (other than traffic violations and other similar infractions), or, to the best of the church’s knowledge, is the subject of any pending criminal proceeding? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | Yes | | | |  | | | | | | No | | | | | If yes, attach explanation on a separate sheet titled “Convictions.” | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **22.** Are there any pending or threatened material legal proceedings known to be contemplated by governmental authorities, administrative bodies, or other persons to which the church and/or its pastors, officers, directors, or trustees are or may be a party, or to which any of the church’s property is or may be subject? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | Yes | | | |  | | | | | No | | | | | | If yes, attach explanation on a separate sheet titled “Property Proceedings.” | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **23.** During the past 5 years have there been any material related-party transactions to which the church and/or any of its pastors, officers, directors, or trustees have been a party, including but not limited to loans from the church to any of its pastors or other leaders, loans among the pastors and leaders, and loans from members to pastors or leaders? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | Yes | | | |  | | | | | No | | | | | | If yes, attach explanation on a separate sheet titled “Related-party Transactions.” | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **24.** During the past 5 years, have there been any disciplinary actions or legal proceedings related to material financial matters involving the church or any of its officers, directors, trustees, or agents of the church, including civil judgments, state or federal regulatory actions, or any other judicial actions? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | Yes | | | |  | | | | | No | | | | | | If yes, attach explanation on a separate sheet titled “Legal Actions.” | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **25.** Are there any assets or liabilities of the church that are not carried on its balance sheet or other records? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | Yes | | | |  | | | | | No | | | | | | If yes, attach explanation on a separate sheet titled “Unrecorded.” | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **26.** Identify the officer of the church (i.e. treasurer, business administrator, etc.) who will certify the correctness of the financial information of the church. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Name | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | Title | | | | | | | | | |  | | | | | | | | | | | | | | | | | |

**Section IV**

**Expansion Resources**

It takes resources for the project to happen. Resources include a combination of cash (fund raising), equity (in real estate assets), future giving (contributions) and borrowed money (conventional financing and bond underwriting). **Fund raising** from church congregants is the very essence of building a strong, viable church community. But asking for money is often seen as a risky endeavor by church pastors. A **capital campaign** is typically needed in order for a church to expand its facility and requires the support of the church’s most capable and influential leaders. Further, the campaign needs to be well planned by experts in collaboration with the churches staff.

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| **1. Expansion funding:** Does the church have any monies set aside for future expansion including the planning thereof? | | | | | | | | | | | | | | | | | | | | | | | |  | | | | Yes | |  | No |
| *If yes, please describe:* | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **2.** **Capital Campaigns:** Is the church currently involved in a *facility specific* capital fund-raising campaign? | | | | | | | | | | | | | | | | | | | | | | | |  | | | | Yes | |  | No |
| *If yes, complete the following:* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Start Date | | | |  | | | Term | | | | | |  | | | | | Amount pledged $ | | | | | | |  | | | | | | |
| Amount received to date $ | | | | | | | |  | | | | | | | | | Number of pledges | | | | | | | |  | | | | | | |
| Percent of total pledges the church anticipates receiving | | | | | | | | | | | | | | | | |  | | | | | | | |
| Represented Use of Funds: | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **3.** Top five capital campaign pledges by dollar amount: | | | | | | | | | | | a. $ | | |  | | | | | | | | | b. $ | |  | | | | | | |
| c. $ |  | | | | | | | | d. $ | | |  | | | | | | | | | e. $ | |  | | | | | | |
| Is the church aware of any of the top five pledges that will not be fulfilled? | | | | | | | | | | | | | | | | | | | | | | | | | Yes  No | | | | | |
| If Yes, Explain: | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Was an outside consultant used? | | | | | | | | | Yes | | | | | No | | | | | If Yes, name of firm assisting in campaign: | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Please provide a campaign brochure if available. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Will the church conduct another campaign upon the conclusion of the current campaign? | | | | | | | | | | | Yes | | | | No | | | | | If yes, when? | | | | | | | |  | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **4.** Has the church previously received any gifts designated for the future expansion facility? | | | | | | | | | | | | | | | | | | | Yes | | | No | | | | | If yes, please describe: | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **5.** If the church is currently using any of its capital fundraising receipts? If so, then please describe how these monies are being used. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **6.** **Stewardship Teaching:** Please describe the preaching pastor’s attitude for discussing (from the pulpit) financial stewardship? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| **7.** Please describe the content covered and the frequency of recent stewardship sermons. Has the preaching gone beyond tithing to further describe sacrificial giving? If so, please describe. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **8.** How is the preaching pastor preparing the congregation to donate money to a future facility expansion? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **9.** Is the preaching pastor willing to consider consulting with a stewardship coach? | | | | | | | | | | | | | | | | | | | Yes | | | No | | | | |  | | | | |

## Section V

**Senior Pastor/Minister**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **1.** Name | |  | | | | | | | | | | | | Title: | | | Rev. | | | Dr. | | | | Bishop | | |
| Pastor | | | | Mr. | | | | Mrs. | | | | Other | | | |  | | | | | | | | | | |
| **2.** Number of years in ministry | | | | | | | | |  | | | | Date employed by church (month/year) | | | | | | | |  | | | | | |
| **3.** Is the senior pastor considered a full-time employee of the church? | | | | | | | | | | | | | | | | | | | | |  | Yes | | |  | No |
| **4.** College(s) attended (name and location) | | | | | | | | | | | | | | | Degree(s) | | | | | | | | Date of Degree | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **5.** Seminaries attended (name and location) | | | | | | | | | | | | | | | Degree(s) | | | | | | | | Date of Degree | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **6.** Churches previously served (name, location and dates) | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **7.** Outside activities (such as civic groups, associations, etc.) | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **8.** Age | | | | | |  | | | | | Marital status | | | | | | |  |
| **9.** Number of children and ages | | | | | | | | | | |  | | | | | | | | | | | | | | | |
| **10.** Does the senior pastor (or any other person in a leadership position) intend to leave the church in the next twenty-four (24) months? | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | Yes | |  | | No | | If yes, explain | | |  | | | | | | | | | | | | | | | | |

**Section VI**

### Pastoral / Ministerial / Executive Staff

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| --- | --- | --- |
| 1. List below all other members of the church’s pastoral and/or executive staff. | | |
| Name | Title | Areas of responsibility |
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| 1. Provide the following information for each associate pastor with day-to-day management responsibilities, and for the business administrator, if applicable. | | | | | | | | | | | | | | | | |
| **A.** Name | |  | | | | | | Title: | | Rev. | | Dr. | | | Bishop |
| Pastor | Mr. | | | Mrs. | | Other | | |  | | | | | | |
| Area of responsibility | | |  | | | | | | | | Years in position | | |  | |
| Number of years in ministry | | | | |  | | Date employed by church (month/year) | | | | | |  | | |

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| *Job Description*:  Bio Narrative: |

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| **B.** Name | |  | | | | | | Title: | | Rev. | | Dr. | | | Bishop | |
| Pastor | Mr. | | | Mrs. | | Other | | |  | | | | | | |
| Area of responsibility | | |  | | | | | | | | Years in position | | |  | |
| Number of years in ministry | | | | |  | | Date employed by church (month/year) | | | | | |  | | |
| *Job Description*:  Bio Narrative: | | | | | | | | | | | | | | | |

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| **C.** Name | |  | | | | | | Title: | | Rev. | | Dr. | | | Bishop | |
| Pastor | Mr. | | | Mrs. | | Other | | |  | | | | | | |
| Area of responsibility | | |  | | | | | | | | Years in position | | |  | |
| Number of years in ministry | | | | |  | | Date employed by church (month/year) | | | | | |  | | |

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| --- |
| *Job Description*:  Bio Narrative: |

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| **D.** Name | |  | | | | | | Title: | | Rev. | | Dr. | | | Bishop | |
| Pastor | Mr. | | | Mrs. | | Other | | |  | | | | | | |
| Area of responsibility | | |  | | | | | | | | Years in position | | |  | |
| Number of years in ministry | | | | |  | | Date employed by church (month/year) | | | | | |  | | |

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| --- |
| *Job Description*:  Bio Narrative: |

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| **E.** Name | |  | | | | | | | Title: | | Rev. | | | Dr. | | | Bishop | |
| Pastor | Mr. | | | Mrs. | | Other | | | |  | | | | | | | |
| Area of responsibility | | |  | | | | | | | | | Years in position | | | |  | |
| Number of years in ministry | | | | |  | | Date employed by church (month/year) | | | | | | | |  | | |
| *Job Description*:  Bio Narrative: | | | | | | | | | | | | | | | | | |
| College(s) attended (name and location) | | | | | | | | Degree(s) | | | | | Date of Degree | | | | |
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| **F.** Name | |  | | | | | | | Title: | | Rev. | | | Dr. | | | Bishop | |
| Pastor | Mr. | | | Mrs. | | Other | | | |  | | | | | | | |
| Area of responsibility | | |  | | | | | | | | | Years in position | | | |  | |
| Number of years in ministry | | | | |  | | Date employed by church (month/year) | | | | | | | |  | | |
| *Job Description*:  Bio Narrative: | | | | | | | | | | | | | | | | | |
| College(s) attended (name and location) | | | | | | | | Degree(s) | | | | | Date of Degree | | | | |
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**Section VII**

**Officers and Staff**

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| --- | --- | --- | --- | --- | --- | --- | --- |
| **1.** Provide the names and occupations of the corporate officers and of all trustees, directors, or members of the governing body of the church corporation as applicable. Provide the same for the head of the building or relocation committee. Note that a full description of occupations (position, title and employer) is required, even if an individual is now retired. Attach additional sheet if necessary. Title additional sheet “Officers and Staff.” | | | | | | | |
|  | | | | | | | |
| **Corporate Officers (President, Vice President, Secretary, etc.)** | | | | | | | |
| 1. Name |  | Office held |  | | Term expires |  |
| Employer |  | | Position |  | | |
| 1. Name |  | Office held |  | | Term expires |  |
| Employer |  | | Position |  | | |
| 1. Name |  | Office held |  | | Term expires |  |
| Employer |  | | Position |  | | |
| 1. Name |  | Office held |  | | Term expires |  |
| Employer |  | | Position |  | | |
| Board of | | **Trustees** | | **(Trustees, Directors, Elders etc.)** | | | |
| 1. Name |  | Office held |  | | Term expires |  |
| Employer |  | | Position |  | | |
| 1. Name |  | Office held |  | | Term expires |  |
| Employer |  | | Position |  | | |
| 1. Name |  | Office held |  | | Term expires |  |
| Employer |  | | Position |  | | |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 1. Name |  | Office held | Trustee | | Term expires |  |
| Employer |  | | Position |  | | |
| 1. Name |  | Office held | Trustee | | Term expires |  |
| Employer |  | | Position |  | | |
| 1. Name |  | Office held |  | | Term expires |  |
| Employer |  | | Position |  | | |
| **Building or Relocation Committee** (persons already selected for committee) | | | | | | | |
| 1. Name |  | Office held |  | | Term expires |  |
| Employer |  | | Position |  | | |
| 1. Name |  | Office held |  | | Term expires |  |
| Employer |  | | Position |  | | |
| 1. Name |  | Office held |  | | Term expires |  |
| Employer |  | | Position |  | | |
| 1. Name |  | Office held |  | | Term expires |  |
| Employer |  | | Position |  | | |
| 1. Name |  | Office held |  | | Term expires |  |
| Employer |  | | Position |  | | |
| 1. Name |  | Office held |  | | Term expires |  |
| Employer |  | | Position |  | | |

**Section VIII**

**Affiliated Organizations/Ministries**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **1.** Does the church directly operate or is it directly affiliated with a school, day care or other organization? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | Yes | |  | | | No | | | | | If yes, provide the following for each as applicable: | | | | | | | | | | | | | | | | | | | | | | | |
| Name of organization | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Date organized | | | | |  | | | | | | | | | |  | | | | | Part of church corporation | | | | | | | | | | | |  | | Separate corporation | |
| Is organization self-supporting? | | | | | | | | | | | | | | | |  | | | Yes | | | | | | |  | | No | | If no, how are operations funded? | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| If a separate corporation, does the church have any contingent liabilities related to this organization? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | Yes | |  | | | No | | | | | If yes, explain: | | | | | | | | | | | |  | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **2.** If organization is a school, provide the following: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Current enrollment | | | | | | | |  | | | | | | | | | | | | | Grades offered | | | | | | | |  | | | |
| Are teachers state certified? | | | | | | | | | | | | | |  | | | Yes | | | | | | |  | | | No | | Cost of tuition | |  | | | | |
| Is school accredited? | | | | | | | | | |  | | | Yes | | | | |  | | | | No | | | If yes, name of accrediting agency | | | | | | | | | |  |
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| **3.** Purpose and brief history of organization. If necessary, attach additional sheet titled “School”. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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**Section IX**

### Current and Proposed Church Building Layout

Please list and then describe each **ministry** that uses space in your current church facility. For each ministry, tell us the size of the room, describe the typical person count, and say whether the room is adequately sized, and if not, how much larger it should be in the future. Please include classrooms, youth areas, nurseries, meeting rooms, prayer rooms, recreation rooms, etc. Please also describe the **administrative** configuration for the church’s staff including private offices, open work areas, conference rooms, work/copy rooms, etc. Finally, please describe the **storage** needs of the church both on-site and off-site. Should any off-site storage be brought back on site? How many square feet of storage area does the church need?

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| **Ministry** name or room function | | | |  | | | | | | | |
| Size of room |  | | x |  | Person  count |  | Is the room  adequately sized? |  | Yes |  | No |
| Description of room use | |  | | | | | | | | | |
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| Please describe the future need | | | |  | | | | | | | |
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| **Ministry** name or room function | | | |  | | | | | | | |
| Size of room |  | | x |  | Person  count |  | Is the room  adequately sized? |  | Yes |  | No |
| Description of room use | |  | | | | | | | | | |
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| Please describe the future need | | | |  | | | | | | | |
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| **Ministry** name or room function | | | |  | | | | | | | |
| Size of room |  | | x |  | Person  count |  | Is the room  adequately sized? |  | Yes |  | No |
| Description of room use | |  | | | | | | | | | |
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| Please describe the future need | | | |  | | | | | | | |
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| **Ministry** name or room function | | | |  | | | | | | | | | |
| Size of room |  | | x |  | Person  count |  | | | Is the room  adequately sized? |  | Yes |  | No |
| Description of room use | |  | | | | | | | | | | | |
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| Please describe the future need | | | |  | | | | | | | | | |
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| **Ministry** name or room function | | | |  | | | | | | | | | |
| Size of room |  | | x |  | Person  count | |  | Is the room  adequately sized? | |  | Yes |  | No |
| Description of room use | |  | | | | | | | | | | | |
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| Please describe the future need | | | |  | | | | | | | | | |
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**Section X**

### Current and Proposed Furniture, Fixtures and Equipment

Please list and then describe all **furniture** in your current church facility, whether you anticipate relocating this to the new facility. Please include sanctuary seating, classroom chairs, tables, office furniture, etc. Please catalog the existing equipment that the church intends to relocate to the future facility including audio, visual, lighting, music, staging, scaffolding, playground, food preparation, landscaping, maintenance, office copier, computers, telephones, security, etc.

While it is not critical now, you may also want to consider fixtures that are attached that the church may wish to relocate. Are there memorable materials that the church intends to remove from the current property and relocate to a future facility (special memorials, stained glass, etc.)?

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| **FF&E** name | |  | | | | | | | |
| Description of FF&E item | | |  | | | | | | |
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| Do you intend to relocate this to the new facility? | | | |  | Yes |  | No | FF&E item count (how many?) |  |
| Please describe the future need | |  | | | | | | | |
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| **FF&E** name | |  | | | | | | | |
| Description of FF&E item | | |  | | | | | | |
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| Do you intend to relocate this to the new facility? | | | |  | Yes |  | No | FF&E item count (how many?) |  |
| Please describe the future need | |  | | | | | | | |
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| **FF&E** name | |  | | | | | | | |
| Description of FF&E item | | |  | | | | | | |
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| Do you intend to relocate this to the new facility? | | | |  | Yes |  | No | FF&E item count (how many?) |  |
| Please describe the future need | |  | | | | | | | |
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| **FF&E** name | |  | | | | | | | |
| Description of FF&E item | | |  | | | | | | |
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| Do you intend to relocate this to the new facility? | | | |  | Yes |  | No | FF&E item count (how many?) |  |
| Please describe the future need | |  | | | | | | | |
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**Section XI**

**Other Property – Separate Locations**

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| **1.** Does the church own or lease any other property separate from the church’s primary location? | | | | | | | | | | | |
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|  | | Yes |  | | No | | | If yes, provide the following: | | | |
| **A.** Property address | | | | | | |  | | | | |
| Type of improvements | | | | | | | | |  | | |
| Size in acres | | | |  | | | | | | Date of acquisition |  |
| Use(s) of facility | | | | | |  | | | | | |
| **B.** Property address | | | | | | |  | | | | |
| Type of improvements | | | | | | | | |  | | |
| Size in acres | | | |  | | | | | | Date of acquisition |  |
| Use(s) of facility | | | | | |  | | | | | |
| **2.** Does the church have any intentions to sell any of these other properties in the near future? | | | | | | | | | | | |
|  | Yes | |  | | No | | | If yes, explain below: | | | |
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**Section XII**

**Proposed New Church Facility**

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| 1. **Proposed land** sites: Please describe any land sites that the church has previously expressed an interest in acquiring. |
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| 1. **Proposed buildings**: Please describe any existing buildings that the church has previously expressed an interest in acquiring. |
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The remainder of this page is intentionally left blank. The signature page follows.

The undersigned, as a duly authorized representative of the church named herein, has prepared and/or reviewed this Questionnaire, and does hereby certify that all information contained herein is true and correct to the best of his/her knowledge and belief. The undersigned further declares that the staff, pastors, officers, directors, or trustees of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Church will use the contents and the ideas contained in this Questionnaire solely and exclusively for the benefit of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Church and that the recipients of this information will not disclose, duplicate or transfer this form or its contents, in whole or in part, to anyone outside of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ without the express written consent of Development Advisors, LLC.

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