

Date \_\_\_\_\_

Client \_\_\_\_\_

### **Client Profile**

Help us to serve you better! Though some of this information may seem obvious based on what we have already discussed with you, it is important that we revisit regularly the current state of your organization. By doing this, we can give you the best advice possible to achieve your most current and pressing goals. In order to do this, we ask that you complete the following questions with the most up-to-date information you can provide. Thank you for taking the time to help Affinity Connection, Inc. help your organization maximize its potential.

#### **Part I. Alumni Organization:**

Approximate size of organization: \_\_\_\_\_ members

Current size of alumni board: \_\_\_\_\_ board members

Strength and activity of board leadership/officers: good/ average/poor

Membership data for organization is generally complete and kept up to date:  
agree/disagree/don't know

Does your organization currently have a formalized communications program? yes/no

If yes, please explain what your communications entail and how often they are distributed. \_\_\_\_\_  
\_\_\_\_\_

Does your alumni organization hold any regularly scheduled events? yes/no

If yes: What? When? How often? \_\_\_\_\_  
\_\_\_\_\_

What (if any) are your challenges to holding a well-attended, successful event?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Has your organization done any fundraising or development in the past? yes/no

If yes, how long ago and how much money was raised? \_\_\_\_\_  
\_\_\_\_\_

What do you currently see as the most important needs/goals toward which your organization should be working?

Short-term goals: \_\_\_\_\_  
\_\_\_\_\_

Long-term goals: \_\_\_\_\_  
\_\_\_\_\_

Do you foresee any of these goals requiring a major fundraising effort in the next one to two years? yes/no

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## Part II. Status of Undergraduate Chapter

Are the undergraduates living in a chapter house? yes/no

If yes, does the house corporation own it? yes/no

If the house is not owned by the house corporation, please explain the current arrangement (owned by the university, etc.) \_\_\_\_\_

Is the chapter in good standing with the campus/university? yes/no

Number of total undergraduate members: \_\_\_\_\_

How much do they pay? \_\_\_\_\_

Number of undergraduate members living at the house: \_\_\_\_\_

How much do they pay? \_\_\_\_\_

How many additional members are needed to reach capacity? \_\_\_\_\_

General condition of the chapter house: good/average/poor

Comments: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Are there challenges recruiting new members? yes/no

If yes, why? \_\_\_\_\_

Is there another organization you consider to pose major competition to your undergraduate chapter in terms of obtaining new members? yes/no

If yes, what advantages does that organization have? \_\_\_\_\_

\_\_\_\_\_

Is there a current chapter advisor? yes/no

Is there a mentor, housemother, or other advisor living in the house? yes/no

## Part III. Other

What are three challenges and/or obstacles currently facing this chapter (at either the alumni or undergraduate level)? (NOTE: Please be candid. It is important that we understand any potentially negative situations the organization is facing so that we may take that into consideration in helping you to achieve your goals and improve your public relations.)

1)

2)

3)

Does the chapter have a scholarship program? yes/no

If yes, how is it funded? \_\_\_\_\_

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Other (continued)

Is there an awards program in place to recognize achievement of members? yes/no

If yes, how often are awards given? \_\_\_\_\_ To

whom/for what types of achievements? \_\_\_\_\_

How is this information currently publicized and shared with other members?

\_\_\_\_\_

\_\_\_\_\_

Does the chapter have an alumni web site? yes/no

If yes, URL: \_\_\_\_\_

If no, why not? \_\_\_\_\_

Does the chapter have an undergraduate web site? yes/no

If yes, URL: \_\_\_\_\_

If no, why not? \_\_\_\_\_

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NOTE: This (below) was random stuff that I didn't think was supposed to be a part of the questions but I didn't want to erase it. In addition, there were two phrases: "Alumni Association" and "House Corporation" that were just sort of randomly placed within the document. Wasn't sure if they were supposed to be developed into specific questions or not.

- Conference call with Sales Rep introduces the Account Manager to the account contact(s)
- Must be CLEAR that this is a partnership. The group must understand and want to be grown. Account manager will need the commitment of at least one member to communicate with regularly. Can you make that commitment?
- First mailing: Intro letter, with appeal, small survey that sells hope. Lost list.