Klarstig

# Education Donor Intake

Gather the information needed to start a new relationship or case. Focus on the person's goals, practical needs and the next step.

## Contact and reference

**Organization using this document**

**Your name or contact reference ***

**Email for a reply if needed**

## Information for this document

**Reason for contacting or joining the organization ***

**Main goals or needs ***

**Relevant background**

**Desired timing**

**Practical constraints or access needs**

### Previous contact or existing reference

### Preferred next step

- ☐ Information
- ☐ Meeting
- ☐ Assessment
- ☐ Application
- ☐ Other

## Specific details

### Giving interests or donor relationship reference

Complete when relevant to this request.

### Preferred involvement and communication expectations

## Operating context

### School program or learning group

Complete when relevant to this request.

### Term dates supervision access and learning arrangements

## Limitations and what needs setup

- Submitting the form records the answers in your workspace. It does not approve, schedule, charge or reply on its own unless you add that step to the workflow.
- Email notifications, approval routing, document generation and connections to other systems are available but not switched on until you configure them.

### Want help tailoring this form? Free, Starter and Pro include five personal setup sessions, up to 30 minutes each, per new organization.

Klarstig / Daniel Petry · klarstig.ai · hello@klarstig.ai · support@klarstig.ai · 800-781-1775 · 11917 Laurel Ave., Forestville, CA 95436, USA