



EMERGE
EDUCATION



Blackford Ventures

Higher Education

Discovery Questionnaire

Blackford Ventures Higher Education Discovery Questionnaire

Please answer all of the questions as completely and accurately as possible to expedite the process.

SECTION 1: CONTACT INFORMATION

DATE:

INSTITUTION:

ADDRESS:

PHONE #:

PRESIDENT:

EMAIL:

OFFICE #:

CHIEF FINANCIAL OFFICER:

EMAIL:

OFFICE #:

MOBILE #:

Blackford Ventures Higher Education Discovery Questionnaire

SECTION 2: QUESTIONS

1. WHAT IS THE INSTITUTION'S CURRENT ENROLLMENT OF UNDERGRADUATE AND GRADUATE STUDENTS?

UNDERGRADUATE:

GRADUATE:

2. WHAT ARE THE CURRENT TUITION COSTS FOR UNDERGRADUATE AND GRADUATE STUDENTS?

UNDERGRADUATE:

GRADUATE:

3. DOES THE INSTITUTION HAVE RELIGIOUS, STATE OR RESEARCH FOUNDATIONS (OR OTHER) AFFILIATIONS OR SUPPORT?

4. WHAT IS THE INSTITUTION'S BREAKDOWN OF REVENUE SOURCES (I.E., TUITION, STATE SUPPORT, ENDOWMENT INCOME, GIFTS, GRANTS)?

IS THE INSTITUTION OVERLY DEPENDENT ON ANY ONE SOURCE?

5. WHAT IS THE INSTITUTION'S INCENTIVE FOR BORROWING OR MONETIZATION? IS IT FOR CAPITAL EXPANSION, EDUCATION PROGRAM EXPANSION OR TO REFINANCE ITS CURRENT DEBT POSITION?

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SECTION 2: QUESTIONS

6. WHAT IS THE CURRENT DEBT POSITION AND HISTORY?

HAS THE INSTITUTION RECENTLY ISSUED/BORROWED DEBT?

IS THE INSTITUTION PAYING EXCESSIVELY HIGH INTEREST RATES?

IS THERE EXCESSIVE COLLATERAL PLEDGED?

ARE FINANCIAL COVENANTS TOO RESTRICTIVE OR TOO MUCH VARIABLE RATE VS. FIXED RATE DEBT?

7. WHAT IS THE INSTITUTION'S CURRENT ENDOWMENT FUND POSITION?

HOW MUCH IS ENCUMBERED VS. UNENCUMBERED?

DOES THE INSTITUTION HAVE AN ACTIVE FUND RAISING CAMPAIGN/PROGRAM?

WHAT IS THE CAMPAIGN/PROGRAM'S FUND RAISING TRACK RECORD?

8. WHAT IS THE INSTITUTION'S CURRENT FINANCIAL RESPONSIBILITY COMPOSITE SCORE AS MEASURED BY THE DEPARTMENT OF EDUCATION?

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SECTION 2: QUESTIONS

9. WHAT IS THE INSTITUTION'S INVENTORY OF MAJOR BUILDINGS OR CAMPUS REVENUE GENERATING ASSETS THAT CAN BE MONETIZED (I.E., BUILDINGS, PARKING, RESEARCH FACILITIES, HEATING/COOLING, SPORTS FACILITIES)?

10. WHAT IS THE INSTITUTION'S GOVERNING BOARD'S ROLE AND DEGREE OF OVERSIGHT?



Return the completed questionnaire to Jim at the email provided below. If you have any questions feel free to give Jim a call directly.

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