

**Organizational Assessment Prescreening**  
**Name of Organization:**

**Name/title of person interviewed**

**Date of interview**

1. **Introduce** self (consultant), ask ED/CEO about his or her background, how long in position, etc.
2. **Review:**
  - Purpose of the process is for board and staff to be together to talk about their hopes for the future, identify issues about governance and management, and reach consensus about items that may need to be addressed.
  - Requirements: there really aren't many requirements, open process. Requirements include: that **board chair and CEO** must attend all of both meetings, can't have a meeting without both; more (or equal number of) board and staff; staff shouldn't outnumber board.
  - **I will send you a form on which you can list the names and roles of board and staff who will attend. Is board president still (name):**
  - Good to have a variety of perspectives: board and staff, some management staff, some line staff or clinicians; can be a valuable leadership training opportunity for some staff members and valuable for the board to interact with staff, especially if they don't usually do that.
  - Typically, two sessions (first is 2 hours, second may be 2 or 2.5 hours). First session is broad overview, hopes, organizational strengths, challenges and opportunities, mission, etc.... during the second session we get into more detail about specific items such as board, finances, fundraising, facilities, technology, etc.
  - Once we're finished with the two sessions, and I begin to draft a final report (may be in narrative or PowerPoint format). I will call you to clarify anything that came up that I may want more information about. Lots of info and before completing the report want to make sure any factual info we discussed is accurate.
  - It usually takes 4-6 weeks to produce the report.
  - In the final report, nothing is attributed to one person – no names in the report; HFPG reviews the draft to make sure it's complete and complies with their format and then I send it to you and board president/chair. After you review, we can agree on changes if any and then, if desired, I can come to a follow-up meeting (about an hour) to review the report with you and board.
  - Any questions about the process?
3. **Reasons for assessment:** NSP shared (organization's name) reasons for wanting to complete an organizational assessment. (*reasons here*) Can you tell me more about all this?
4. **Results:** what do you hope the outcomes of the organizational assessment process will be?
5. **Culture:** anything about the culture of the organization that would help me to know?
6. **Anything else that you think is important for me to know right now?**