

Discovery Sessions

Consultant Assumptions

Review of the Organizational Assessment (OA) and Discovery Sessions (DS) using an equity lens led consultants to conclude that both processes should be available to any organization regardless of budget size or staffing model (paid staff or all-volunteer). Such eligibility will make access equitable for under-resourced organizations, which may benefit from the process (OA or DS) that fits best with the organization's current need.

Discovery Sessions – Purpose

To address a specific governance level organizational issue with the assistance of a skilled facilitator. Areas of challenge that may be addressed through the Discovery Session include, but are not limited to:

- Mission
- Planning
- Sustainability
- Governance
- Supporting Resilience and Building Capacity

Some specific issues that Discovery Sessions may address include:

- Defining organizational purpose
- Rethinking organizational mission and vision
- Addressing a specific board conflict
- Strengthening the board-executive director partnership
- Beginning a conversation to explore a partnership opportunity
- Assessing a funding opportunity or plan for a funding loss

Discovery Sessions – Anticipated Outcomes

NSP – Strengthens nonprofit health and capacity by providing services to organizations in need of exploring a single specific issue/challenge so that the organization can better serve its constituents and the community.

Organization – Builds a shared understanding among board and staff about a specific organizational issue/challenge. Discussion at sessions may lead to resolution of the issue or the development of action steps that the board and staff may implement to address the issue in the future.

Consultant – Provides structure for skilled consultants to facilitate a meaningful conversation in a safe context so that the board and staff can effectively work together to address an organizational issue/challenge.

Points of Entry

- Organization self-referral
- NSP Staff
- Community Impact Program Officer
- Outcome Team

How to Use

Provide consulting support to:

- an organization in crisis - i.e., ED/Board conflict, unexpected leadership transition, unanticipated funding loss, organizational decline, etc.
- an organization preparing for and/or navigating change – i.e., rethink organizational guiding principles (purpose, mission, vision, values), set foundation for organizational planning, integrate new members of the leadership team (board and staff), evaluate partnership opportunities
- as a follow-up to an OA when the OA identifies a specific organizational issue that needs consulting support to address and assist the organization with moving forward

Steps in Discovery Sessions Process

	Description	Comments
1. Interview with NSP staff and organization completes application	To determine eligibility and reason for DS and to explain process; organization completes application.	All organizations are eligible if they are aligned with HFPG's strategic priorities. Organization completes application and provides documents (bylaws, budget, board meeting minutes, and others) as part of the application process.
2. Match consultant	NSP assigns consultant, informs organization, sends material to consultant	
3. Consultant conducts pre-DS interview with organization	Consultant reviews process, identifies reason for DS, explains logistics (number of meetings, participants etc.)	Participants to be as inclusive as possible, in addition to the board chair, consider board officers, committee chairs and any staff or volunteers – including differing perspectives to get the most from the process.
4. DS Sessions	Typically two sessions (1.5-2 hrs.) and optional 1 hr. follow-up meeting	Flexible process designed to meet organizational need. First session is generally to introduce and build a common understanding of the issue the organization wants to address. Second meeting is an opportunity to work through the issue resulting in either resolution or development of next steps and consultant recommendations.
5. Final Report	Brief narrative memo or PowerPoint– with recommendations and next steps. May also include useful resources for organization.	
6. Post-report session (optional)	One 1 hr. session to review/discuss recommendations	
7. Final version of report submitted to NSP	Consultant submits report to NSP at end of process.	