

Discovery Sessions Prescreening
Name of Organization:

Name/title of person interviewed:

Date of interview:

1. **Introduce** self (consultant), ask ED/CEO/board member about his or her background, how long in position.
2. **Review:**
 - Purpose of the DS process is for your board to explore issues that are of concern at the current time. For example, some groups are trying to define their ultimate purpose or mission.
 - Requirements: there really aren't many requirements, open process. Requirements include: that **you and the chair or president of your board** must attend the one or two meetings; we have can't have a meeting without both.
 - **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):**
 - Typically, a two-hour session that may be followed by a second one- or two-hour session. First session is to introduce the issue or issue you want to address and second is an opportunity to perhaps resolve issue or decide on next steps. Once we're finished with the one or two sessions, I will call you to clarify anything that came up that I may want more information about.
 - I draft a memo (one or two pages or PowerPoint); nothing attributed to one person – no names in the report; HFPG reviews the draft to make sure it's complete and then I send to you and chair or president. 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 memo with you and board.
 - Any questions about the process?
3. **Reasons for Discovery process:** 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 process will be?
5. **Culture:** anything about the culture of the organization that would help me to know?