

CEN Consulting Intake Questionnaire

Please have both the executive and board chair independently complete this questionnaire, in as much detail as possible, so we understand your desired outcomes. Upon completion, we ask that you email the response(s) back to us (CEN_information@cen.org) and, within two business days, a member of our consulting team will connect with you to discuss moving forward. Questions about the process? Give us a call at 650.517.5855.

Today's Date:

Organization:

Contact:

Position:

Phone:

Email:

Organization's Address:

1. Are you currently a CEN member? Yes No Unsure
2. What type of consulting are you requesting?
3. Have you worked with a consultant in the past? Yes No

If yes...

a. Was it with CEN or another organization?

b. What was most helpful? What was least helpful?



CEN

Center for Excellence in Nonprofits

4. How/why, did you become involved with your organization? _____

5. How has it grown or changed over time? _____

6. Please list your current programs and describe how they connect to your mission? _____

7. How do you track the value/impact of your programs? _____

8. How is the organization funded? (Circle one or more.)

Private Donors Grants Gov't Grants Other Don't Know

a. If Other, please explain: _____

9. What percentage of your revenue will come from the same sources next year? _____

10. What size is your staff? _____

11. Do you have a strong management team in place? Yes No

12. What is missing? _____

13. How many members currently serve on the board? _____

14. Is the board effective? Yes No

15. What/who could strengthen your board? _____

16. Executives: What are your priorities and on what do you spend most of your time working? _____

17. Board chairs: As a volunteer, how do you spend most of the time you devote to the organization? _____

18. How familiar are board members with their responsibilities? (Circle One)

Very Familiar Somewhat Familiar Not Familiar I Don't Know

19. Is the board able to read and understand the financial statements? Yes No

20. Are your meetings led in a strategic manner? Yes No

21. What are your organization's priorities for the next 3 years? _____

22. Do you have a current strategic plan? Yes No

23. Is the strategic plan consistently reviewed, utilized, and updated? Yes No

24. When was it most recently referred to and/or used? _____

25. Are the executive and board (as a body) in agreement on the need for and scope of the consultation? Need: Yes No / Scope: Yes No

26. Who will be included in the consultation? _____

27. How many hours of consultation are you requesting? _____

28. What is the budget? _____

29. Do you have preferred dates and times for the consultation? Yes No

a. If so, list them here: _____

30. Where will the consultation be held?

31. When are you available to schedule a call (please list 3 days and times)?

- a. _____
- b. _____
- c. _____