



## 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 ([information@cen.org](mailto:information@cen.org)) and, within three 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.

### General Organization Information:

Date:

Name of Organization:

Contact:

Position:

Phone:

Email:

Address of Organization:

Org size:

- # of staff:
  
- # of Board Members:
  
- Avg. Budget: \$

Team members responsible for consultation (if applicable):

### Questionnaire:

1. How did you hear of CEN?



2. What type of consulting are you requesting?

3. What size is your staff?                      Staff members

4. How many members currently serve on the board?                      Board members

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

*If yes...*

- Is the strategic plan consistently reviewed, utilized, and updated?

Yes

No

- When was it most recently referred to and/or used?

**Consultation Details:**

1. Who will be included in the consultation?

2. How many hours of consultation are you requesting?                      Hours

3. What is the budget? \$

4. Do you have preferred dates and times for the consultation?

Yes

No

*If yes, list them here:*

5. Where will the consultation be held?



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