

## 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 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.

### 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. 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...

- Was it with CEN or another organization?  
CEN            Other:
- What was most helpful? What was least helpful?

4. How and 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? (Select one or more)

Private donors    Grants    Gov't Grants    Other    Unknown

- If other, please explain:

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

10. What size is your staff?                      Staff members

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?                      Board members
14. Is the board effective?                      Yes                      No
15. What/who could strengthen your board?
- 
16. Executives: What are your priorities and what do you spend most of your time working on?
- 
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?
- Very familiar                      Somewhat familiar                      Not familiar                      Unknown
- 
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 three years?
- 
22. 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. Are the executives and board (as a body) in agreement on the need for and scope of the consultation?

a. Need:                      Yes                      No                      Scope:                      Yes                      No

2. Who will be included in the consultation?

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

4. What is the budget? \$

5. Do you have preferred dates and times for consultation?

Yes                      No

If yes, list them here:

6. Where will the consultation be held?

7. When are you available to schedule a call? Please list 3 dates and times:

- a.
- b.
- c.