



IDEAL 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) 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.

IDEAL = Inclusion, Diversity, Equity, Access & Liberation

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. Do you have a current strategic plan and/or theory of change?

Yes No

- *If yes, is the strategic plan/theory of change consistently reviewed, utilized, and updated?*

Yes No

2. How does your organization need to improve in the areas of Inclusion, Diversity, Equity, Access, and Liberation?



3. Describe the promotion and evaluation process and who is in charge of these decisions?

4. Is the diversity of ideas and experiences celebrated in your organization? If so, how?

5. Are any IDEAL initiatives in place to help foster positive organizational or departmental change? If so, please describe them?

6. Does the organization have an internal Equity Team, DEI Committee, Employee Resource Group(s) (ERG), Affinity Groups, or a related internal task force? Yes No
If yes, please tell us about each group or committee and how they were formed:

7. What is the organization doing to actively ensure everyone feels included (staff, clientele, stakeholders)?

8. What tangible IDEAL goals does the organization have? Who is responsible for monitoring and making sure these goals are met?

9. Does your organization/team/board embrace or resist change?

10. What are your most important values of your organization?

11. Is the leadership (staff & board) committed to IDEAL in the organization? If so, how do they express that and ensure that commitment cascades down throughout the organization?

12. Is your organization comfortable having difficult conversations issues surround challenging topics like race, gender, equity, culture, etc.? How is this demonstrated?

13. Does everyone support the need for IDEAL training? If not, who and/or how many are in support and opposition?

Consultation Details

1. How many hours of consultation are you requesting? Hours
2. Please describe any pre-discussed ideas for structure of consultation?

3. What is the budget for this consultation? \$
4. Do you have preferred dates and times for 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 dates and times: