

## 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](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.

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. Are you a CEN community member?                      Yes                      No                      Unsure

2. 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

3. How does your organization need to improve in the areas of Inclusion, Diversity, Equity, Access, and Liberation?
  
4. Please describe the diversity:
  - a. Board of Directors:
  - b. Executive Team:
  - c. Management/Supervisors:
  - d. Staff:
  - e. Clientele:
  
5. What data do you collect that shows this level of diversity?
  
6. Describe the promotion and evaluation process and who is in charge of these decisions?
  
7. How are team building events & celebrations prioritized (both work and social)? Are they made available to the entire staff?
  
8. Does the organization foster an open, communicative environment for employees? If so, how?
  
9. Is the diversity of ideas and experiences celebrated in your organization? If so, how?
  
10. Are any IDEAL initiatives in place to help foster positive organizational or departmental change? If so, please describe them?

11. 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:
  
12. Describe the hiring process and how the organization ensures the pipeline of candidates is diverse?
  
13. Do the organizations recruiting efforts support a diverse culture?
  
14. What is the organization doing to actively ensure everyone feels included (staff, clientele, stakeholders)?
  
15. Did the organization react to and/or issue any statements of solidarity with the social movement in support of Black lives? If so, please provide details and attach copies of resulting policies, statements, etc. Were action steps for the future created?
  
16. What tangible IDEAL goals does the organization have? Who is responsible for monitoring and making sure these goals are met?
  
17. What is your organization's culture around failure?
  
18. Does your organization/team/board embrace or resist change?

19. When someone on the team makes a mistake, are apologies requested/accepted? If so, how is this evidenced?
  
20. Can employees/managers/board members voice a contrary opinion without fear of retribution?
  
21. What are your most important values of your organization?
  
22. Can everyone on your team report the same organizational values? How do you know?
  
23. 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?
  
24. What does accountability look like in your organization? How does it pertain to IDEAL efforts?
  
25. What regular IDEAL or cultural responsiveness training does your organization offer? If so, who participates (directors, managers, staff, board)?
  
26. Does the organization have programs in place to support diversity and inclusion? If so, what are they? Are there future plans to address diversity and inclusion?
  
27. What is the approach to understanding the perspectives of and making space for dialogue and discussion among colleagues from different backgrounds?

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

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

30. Are you willing to stand apart from staff/board members/stakeholders/etc. who do not embrace the IDEAL principles?

### **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:

- a.
- b.
- c.