



GiveSmart

Donor Decision Tool

Guide to Interviewing a Nonprofit's CEO

Collaborating to accelerate social impact

www.GiveSmart.org

The executive director, president, or CEO is often the driving force behind a nonprofit, inspiring staff, donors, and beneficiaries alike. Think of Geoffrey Canada, raised by a single mom in the South Bronx, who has gone on to transform Harlem and the future of community development with his organization, the Harlem Children's Zone. Or Wendy Kopp, the college student who turned her senior sociology thesis into Teach For America, an engine in today's education reform movement. This is your opportunity to meet a great leader and be a catalyst to his or her success.

Meeting with the executive director of an organization you're hoping to support can provide insight into how he or she thinks about challenges, how you could support the organization, and whether there's potential to build a strong working relationship.

As always in the grantmaking process, you'll need to balance your desire to learn more with respect for the time of the person you're talking with.

By this point you have done a fair amount of research; now is the time to dig deeper and form a perspective about whether the executive director has what it takes to meet the challenges of running the organization and whether your views are in sync about some key issues.

As always in the grantmaking process—and in particular when requesting time from busy leaders—you'll need to balance your desire to learn more with respect for the time of the person you're talking with.

If you only have an hour, posing questions around the eight areas on the next page should help you cover the most important ground. If you have enough time to cover more, you could mix and match from the entire set of questions on the pages that follow.

Questions on eight critical areas:

1. How did you become involved with this organization? (Or, if the leader also founded the organization: Why did you start this organization? How has it grown or changed over time?)
2. Can you tell me about the work your organization does and the program or programs you run? [As a follow up, what differentiates you from other organizations?] (Here you are trying to get at how the organization is unique while confirming your impression of what causes or people it serves, what programs it offers, and how it gets results.) What do you think your constituents or beneficiaries would say is the best thing about your organization?
3. What results does your organization achieve? How has your program improved over time?
4. What are your goals for the next three to five years? What priorities will help you achieve them? What barriers are in your way?
5. What proportion of your revenue for next year will come from similar sources to this year's revenue? Do you have plans to increase this consistency over time? (Here you are trying to get a sense of how stable/unstable their revenue picture is, and how dependent it is on a few decision-makers.)
6. Where is your leadership team strong, and where does it need development?
7. What is the hardest decision the organization has had to make recently, and how did you evaluate the tradeoffs involved?
8. What do you, personally, spend most of your time on?

Areas to Discuss: The Big Four

Read on for more detailed questions in each of these four areas or click on the area you're most interested in.

- [Strategy and results](#)
- [Leadership](#)
- [Financials](#)
- [Organization and operations](#)

Strategy and results

Summary questions

- What are your goals for the next three to five years? What priorities will help you achieve them? What are the barriers in your way?
- What are the most important issues facing your organization? What plans are in place or are being developed to address these challenges?
- What do you, personally, spend most of your time on?
- Which external stakeholders/groups/key influencers are major supporters of your organization?
- How does your organization fit into the broader landscape of your field? What other organizations and partners does your work rely on?

Ask: What is the hardest decision the organization has had to make recently, and how did you evaluate tradeoffs involved?

Program design

- Can you tell me about the work your organization does and the program(s) you run? [As a follow up, what differentiates you from other organizations?] (Here you are trying to get at how the organization is unique while confirming your impression of what causes or people it serves, what programs it offers, and how it gets results.) What do you think your constituents or beneficiaries would say is the best thing about your organization?
- What change or outcome are you seeking (or, what is the unmet need you are addressing)?
- How does each program connect to your goals for the organization?
- Which programs take up most of your time? Which take up most of the organization's resources?
- What is the hardest decision you have had to make recently about the work the organization does, and how did you make this decision?
- What is the hardest thing to get right about your program?

Program effectiveness

- What evidence do you have that your programs work? Specifically, what results does your organization achieve?
 - What barriers do you face in evaluating your effectiveness?
 - Have you conducted any third-party evaluations? If so, what have you learned?
 - What processes and systems do you have in place to collect data? What exactly do you measure, and how does the data you collect help you to make decisions?
 - Could you share how you and your team discuss the data you collect?
- Ask: What evidence do you have that your programs work? Specifically, what results does your organization achieve?
- How do you use outcome data and feedback to improve programs and make decisions? Or, can you give me an example of how your program has improved over time?
 - Can you share a time when you used data or feedback to make a decision?

Leadership

Executive director and senior leadership

- What in your own background prepared you to lead this organization?
- Tell me about the members of the leadership team. What capabilities and experiences do they bring and what are their roles in your organization?
- Where is your leadership team strong, and where does it need development?
- How do you make sure that your team members are developing professionally and building their skills?
- How does your leadership team communicate effectively with staff?
- Does the organization have a succession plan in place for senior staff members, including the executive director?
- What is the hardest decision the organization has had to make recently, and how did you evaluate the tradeoffs involved?

Board

- Tell me about your board. What experiences and knowledge do board members bring? Who are the most influential members?
- How would you characterize the board's role in your organization? What does the board do that is most helpful? What does it do that is less helpful?
- Would you consider your board to be a well-functioning team?
- Do board members engage with the organization outside of board meetings?
- Do you feel that the board has contributed to your professional development?
- What do you look for in new board members? What is your process for recruiting new board members?

Financials

Financial management

- Do you believe that your organization's priorities are appropriately reflected in your budget?
- What are your major costs and how constant are these costs? (For organizations that work with people) what is the cost per beneficiary? (Given the size of this investment, does it seem realistic for the organization to achieve the outcomes it hopes to for each beneficiary?)
- Describe your financial management processes. Who is responsible for your organization's finances?
- If your revenue were cut by 25%, what would you do to make ends meet?
- How have your financials compared to your budgeted numbers over the last three years? If there have been major differences, why?
- Who on the board has financial expertise? Do you have an audit committee?

Ask: Do you believe that your organization's priorities are appropriately reflected in the budget?

Revenue sources

- What type of revenue sources do you attract, and who are your major sources of revenue?
- How much of total funding do your top funders account for? How constant and predictable are these funding sources?
- What proportion of your revenue for next year will come from similar sources to this year's revenue? Do you have plans to increase this consistency over time? (Here you are trying to get a sense of how stable/unstable their revenue picture is, and how dependent it is on a few decision-makers.)
- Describe your development strategy. What is the messaging you use with potential funders and those whom you target? Looking ahead, do you anticipate any major changes in your funding sources?
- Please walk me through the proposed budget for the project and describe how the estimates were derived. What percentage of the required funding has been committed? (Applicable if the organization is requesting funding for a specific project.)

Cash position

- How would you characterize your organization's financial situation? What are your most pressing concerns?

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- Have you had any difficulty making payments or obtaining credit in the past year?
- How much excess cash do you target to have on hand (operating reserves/working capital) in case of emergency?
- Describe the timing of your revenues and expenses.

Do they usually line up or are there predictable times of year when they don't align? (If your analysis has surfaced negative working capital, this may be a concern for the organization.)

Organization and operations

- Describe your strategic planning process. Who is involved? How do you reach consensus on the right goals for the organization? How are decisions made and implemented throughout the organization?
- If your grant would require the organization to start a new program or shift its priorities: How well does your organization manage change? Can you give an example of a recent change and how you drove it through the organization?
- What are your strongest-resourced areas (for example, finance, program execution, development)?
- If you were given a significant sum of money to invest in your infrastructure, where would you invest it? Is your infrastructure (financial, IT, other systems) scalable?
- Have you been able to retain the strongest members of your management team?
- Where would you most like to build talent? Do you think that the organization is able to attract and retain talented people?

Ask: How well does your organization manage change? Can you give an example of a recent change and how you drove it through the organization?