# Planning Interview Protocol

Assessing your organization’s current situation is an important aspect of strategic planning. As you begin this process, be clear about what you want to find out and whose opinions can inform your understanding. Some planning projects focus exclusively on people outside of the organization — funders, donors, constituents who use its services, and community leaders. Others gather information inside the nonprofit from the board, staff, and volunteers. Either approach can be a good one.

Many planning efforts confer with both insiders and outsiders. You should develop different questions if they are directed at board and staff versus people with external perspectives. For each group of interviews, talk to approximately eight people. We’ve drafted sample interview questions below. We wrote them with an “outside” audience of funders and community members in mind.

Interviews may be conducted by phone or in person. In arranging the interview appointment, be clear about the amount of time needed. We recommend scheduling an interview for 50 minutes or an hour so you can be certain to complete it on time. Asking seven or eight key questions likely will fill 45 minutes.

Before your staff or board embarks on these interviews, determine whether you need outside expertise from consultants who specialize in nonprofit planning work. Interview subjects may be more candid when talking to a neutral party than when talking to you. If the questions are sensitive in nature or major changes are being considered, an interviewer who is not affiliated with your nonprofit may uncover better information.

***Preface and Overview***

1. Thank the interview subject for his time.
2. Describe your role in the surveying.
3. Tell your interview subject that he will be named as a resource in your plan, but his quotes and opinions won’t be directly attributed to him, and you encourage him to be candid.
4. Ask for his name and title.

***Sample Interview Questions***

1. What is your relationship to Central Services for Youth?
2. What is the most important work that Central Services does in the community? What are its most meaningful and effective programs?
3. Do you consider any of its programs to be less effective and successful?
4. Are there comparable organizations whose work you admire? Who are they and how are they similar to or different from Central Services for Youth?
5. Who needs Central Services’ programs the most? Do you know of groups or neighborhoods of children and youth that are not currently served and should be?
6. If Central Services for Youth had resources to grow, what should its priorities be?

*Prompts to test some options:*

* 1. More services for younger children?
  2. Expanded athletic programs?
  3. Programs in other neighborhoods?
  4. Job training for older youth?

1. How would you measure the effectiveness of Central Services’ programs?
2. Are you aware of resources or funding for youth programs that Central Services may not know about?
3. Do you have any other opinions you would like to share about Central Services?