

SUSTAINABILITY AUDIT: STAKEHOLDER INTERVIEW QUESTIONS

Essential to a valid agency assessment are the views of persons external to the organization—funders, peer agencies, community members. It has been the experience of *Executive Transitions* that the program officers in supporting foundations and contract officers in government agencies are especially helpful in rounding out an assessment. As grant monitors they know the agency; and they also have a perspective on challenges and emerging trends in the broader sector in which the agency operates, e.g., homeless support programs.

How it's used by CompassPoint:

1. A draft of the questions is approved by the board's Succession Planning Committee.
2. The Succession Planning Committee and Executive Director should finalize a list of 8 to 15 external stakeholders representing a diversity of viewpoints on the agency. Consider including:
 - Critics and competitors as well as friends and partners
 - Diversity (as relevant to the agency's work)
 - A strong cross-section of clients or beneficiaries of the agency's work
3. Prior to the interviews, the Executive Director should notify the identified stakeholders that a Committee member or a consultant working with the group will be contacting them as part of the ongoing agency assessment.
4. The results of the external stakeholder interviews are combined with data gathered from the other stakeholder groups—board members, staff members—to arrive at both operational and programmatic issues that need to be addressed by agency management and the skills needed by the next executive director

Opening remarks to external stakeholders

Dear Agency Stakeholder,

As you may know, we are undertaking succession planning work to define strategic vision and identifying capacity building needs prior to the eventual departure of our Executive Director. Your unique perspective of the agency and its work is important in setting future directions at the agency.

All information gathered in this interview will be used in the assessment, but we will not attribute the information to you or your affiliation. Therefore, I hope that you will be fully forthcoming with your insights.

Interview questions

1. How long have you been aware of Agency X and in what capacity have you worked with the organization?
2. What do you think the purpose of Agency X is in the community?
3. What do you think are the greatest strengths of Agency X in fulfilling its purpose?

4. What do you perceive as the greatest area for possible improvement?
5. How well does Agency X collaborate with other agencies in the community?
6. What major issues do you see on the horizon that might impact (be a barrier) to Agency X successfully providing its services?
7. How do you see Agency X needing to change to meet these barriers/challenges?
8. Do you see any opportunities in the community that Agency X is missing out on and should be taking advantage of?
9. What concerns do you have knowing that the executive director will be leaving the organization?
10. *A summary question, such as:* What do you think the highest priorities of the Agency X leadership should be in the future?