

Successful Interviews with Grantees

Developed by
Stephanie McAuliffe: The David and Lucile Packard Foundation
for the July Institute for New Grantmakers, 2002

PLANNING		
You want to know...	Do not ask...	Do ask...
...if the organization is flexible and able to cope with rapid change.	Are you capable of planning for unforeseen contingencies?	We are all working in a rapidly changing environment where many things that affect us are outside of our control. What are the challenges you see ahead for your organization? How are you planning to prepare for or address these challenges?
...if the organization's leaders are aware of the larger context of their work.	Do you know what is going on in your field?	
...if the organization's statement of purpose reflects what it actually does.	Does your organization's purpose statement describe what you actually do?	
...if, in general, the organization achieves what it sets out to do.	Do you actually achieve what you set out to do?	
...if the organization pays adequate attention to overall planning.	Do you plan?	

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GOVERNANCE		
You want to know...	Do not ask...	Do ask...
<p>...if board/staff relations are good.</p> <p>AND</p> <p>...if the respective roles of board and staff are defined and honored.</p>	<p>Do staff and board work well together?</p> <p>OR</p> <p>Does your board know its place?</p>	<p>The roles of the board and board/staff relationships are among the most challenging aspects of organizational life. What are the issues your board is dealing with right now? How are board and staff working together, and separately, to address these issues?</p>
<p>...if the committee structure is aligned with the core functions and challenges facing the organization.</p>	<p>Does your committee structure make sense?</p>	
<p>...if the board assesses its own performance periodically.</p>	<p>Does the board think about what it is doing?</p>	
<p>...if there is adequate attention to board development/training.</p>	<p>Does the board know what it is doing?</p>	
<p>...if the relationship between the executive director and the chair of the board is strong.</p>	<p>Do you get along with...?</p>	

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STAFF CAPABILITIES AND MORALE		
You want to know...	Do not ask...	Do ask...
...if the staff leadership of the proposed program/project are qualified and capable.	Is your staff qualified to direct and implement this program?	A capable staff is essential to a successful program but it can be very hard to find and train the right people. Tell me about the background of key staff? What do you see as their greatest strengths?
...if staff morale is good.	How is staff morale?	
...if staff turnover is high.	Have you experienced high turnover on the staff recently?	
...how the staff view the board.	Do you think the board knows what it is doing?	
...if there is adequate attention to staff training and development.	Is the staff trained to do their work?	
...if the executive director is respected by her or his subordinates.	Do you respect your boss?	

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PROGRAM STRENGTH/POTENTIAL IMPACT		
You want to know...	Do not ask...	Do ask...
...why the applicant has chosen a particular approach to an issue and whether the program leaders are aware of best practices in the field.	Are you aware of best practices in the field?	What was your process for researching and designing your particular approach to this program? What were some of the reasons for selecting this approach?
...if the applicant organization is in touch with and responsive to its community and constituents.	Is your organization responsive to its constituents?	
...if the organization considers input from constituencies in planning and decisionmaking.	Do you pay attention to your clients' point of view?	
...if the agency's programs actually produce an acceptable level of quality services.	Is your program of the highest quality?	
AND	OR	
...if there is appropriate attention to evaluation overall.	Do you evaluate your programs?	