



THE CENTER
FOR EFFECTIVE
PHILANTHROPY

Early-Stage Grantmaking Organizations: Interview Questions

GENERAL

- Could you (each) say what your role is, and how long you have been at the organization? When in the organization's history did you come on board?

THE BEGINNING

- When and why was the decision to create this philanthropic organization made?
- [*To be asked of LLCs only*] Why was the decision made to set up the organization as an LLC?
- What were the **most helpful** resources (e.g., people, organizations, writing) used when getting the organization up and running? Did you reach out to other organizations directly?
 - Did you turn to any other foundations as a resource?

DEVELOPING THE ORGANIZATION

The remainder of the interview will be semi-structured; we will be asking the questions below as they are relevant and not necessarily in the order listed.

- If you were talking with others in the early stages of developing their philanthropic organizations, what would be the most important pieces of advice you would want to share with them based on your organization's experience?
- Knowing what you know now, or what you've learned through your predecessors, what would you have done differently if you were back in those early days?
- How did you/the organization prioritize what needed to be done and when in those early days?
- Looking back, at what point in time do you believe the organization transitioned out of the early "start-up" stage? Or do you feel you are still in that early "start-up" stage?
 - What marked that point?

INTERVIEW PROTOCOL

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- What was different after that stage?
- What suggestions would you give to others who want to put their organizations in the strongest possible position to enter the next stage?

- For the following topics, we would like to hear about any **lessons** you have learned about forming or operationalizing each of these areas, as well as the experiences that led to those particular lessons.
 - *Donor Intent*
 - *Governance – the Role of the Board (or Management Structure for LLCs)*
 - *Organizational Culture and Values*
 - *Staffing*
 - *Operations (e.g., finances, communications, technology, etc.)*
 - *Establishing Programmatic Goals*
 - *Grantees*
 - *Determining What Success Looks Like Both Programmatically and Operationally*

FURTHER REFLECTIONS

- Is there anything else you would like to share that we did not cover in the interview?