

## Introduction with Consulting Partner

The purpose of the orientation meeting is to accelerate the nonprofit organization knowledge of participants in the Dream session, before the first day of the Dream Workshop. Success will be that during the Dream session, our members are able to explore a wide range of new ideas and ultimately focus on a high impact project to design and deliver in the future instead of having to spend time educating partners about their nonprofit.

### Overview

- What you do at a high level (e.g. the elevator story of the nonprofit)
- History of your organization including historical milestones to present (e.g. content taken from new employee orientation)
- Latest strategic plan including your mission, vision, values (e.g. reference to website, cut/paste from nonprofit intranet)
- Describe your culture, particularly aspect that may not be commonplace elsewhere.
- Give a brief overview of your executive team, governance (org structure and rhythm of business), organization structure, and decision-making process.
- Current organization-wide goals and plans with key performance indicators
- Share your major events/meetings/seasons during the year
- What other projects do you have in flight that might impact the current project and/or has this project been tried in the past
- What are the major pain points and challenges in your sector( what are you trying to address and how are your competitors trying to address it?)
- Challenges with change initiatives in the past that are still valid and may inhibit success of a Dream, Design, Implement process
- Is your organization a federated model or centralized? If federated how much autonomy do the offices have? Will your model be changing in the next 1-2 years?

### Mission Model

- Financial overview such as total revenue, expenditure, and key measures such as number of employees (e.g. recent annual report or Information About Your Organization NetHope Survey)
- Restricted/unrestricted funding ratios/constraints including key back donors
- Funding allocation process
- Funding schedules and timing (e.g. sustainability plans, grant cycles, budget cycle, mid-year reviews)
- What's at risk in your business model that is driving the need for transformation? Why change and why now?
- What are you thinking in terms of the funding model for dream, design, delivery stages and timing? How much do you have allocated for these initiatives? Do you need support fundraising or planning for budget?

### Technology Position

- Technology portfolio with specific key vendor offerings currently in-use
- Technology funding model
- Technology governance

- Technology refresh schedule
- Top-level architectures
- Major systems including product names
- Specific technologies involved in the Dream
- Operating context of the Dream (e.g. broadband back office vs. occasionally connected low-band field worker)

### Dream Specific

- Why the dream?
- Key stakeholders in the dream and their strategic plan if different than overall organization.
- Who will attend the Dream session (e.g. background, years with nonprofits, journey of doing good)

### Project Overall

- Who are the main stakeholders we'll be working with on an ongoing basis?
- What will the returned-benefit expected for this project?
- What are the goals and timeline for this project?