

# GOVERNANCE

## Phase II: Stabilizing Governance



### Activity 14: Home Organization – Requirements Gathering and Assessment

#### Goals

1. Determine if your program would benefit from contracting with a home organization
2. Gather requirements for assessment and decision

#### Prerequisites

None

#### Who Should Participate?

Program leadership (strategic thinkers), or those who have experience or knowledge with identifying potential new organizations, assessing financial health and stability, and assessing terms/conditions and MOUs.

#### Length

#### Definition

**Fiscal Sponsor/Home Organization:** An organization that provides legal and financial infrastructure for your program. Services may include financial reports, banking relationships, invoicing, etc.

- Example use case: grant-funded program that needs help with financial tracking

Many organizations offer a range of additional services as well. Such services range significantly but could include consulting, event facilitation, marketing, technical support, grant writing, etc.

- Example use case: an emerging program growing from a grant-driven initiative to a program that is community-based and needs to move out of their original organization.

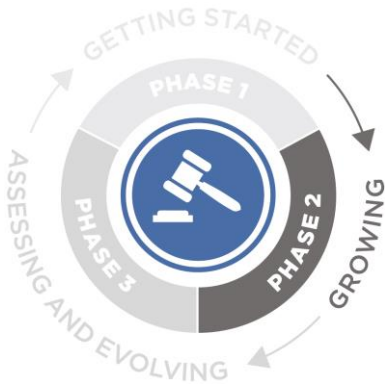
Programs have a range of needs. You might want to consider a smaller set of services or a larger scale relationship.

#### Activity Instructions

##### Group Discussion Around Needs and Gaps (30-60 minutes)

As a group discuss the following

1. Consider your program's biggest needs. This will enable you to determine any gaps with your current situation and evaluate how a new organization could help. Tip: results from previous ITAViP activities can help surface these.
2. Determine what gaps might be addressed by moving to a new organization.
3. Define the impact of the move and determine how to navigate through these changes. Considerations include:
  - Impact to existing staff (i.e., if they cannot move to the new home with the program, will they remain as volunteers? How will they be recognized for their contributions?)
  - Current organization's change in role



# GOVERNANCE

## Phase II: Stabilizing Governance



### Activity 14: Home Organizational – Requirements Gathering and Assessment

#### Requirements Gathering

Consider requirements either individually asynchronously as pre work or synchronously in small groups. Then come together as a group to prioritize and finalize selection criteria. (1-2 hours)

1. Determine criteria for selection. Potential categories are listed below. You can use tool [Home Organization – Requirements Gathering and Assessment Scoring Tool](#) as a template. Tip: download a local version of the spreadsheet to work with.
  - a. Service offerings
  - b. Financial health
  - c. Reputation
  - d. Terms and conditions
  - e. Other

#### Assessment

2. Compile a list of potential home organizations. Tip: ask colleagues or funders for suggestions.
3. Discuss/Interview with potential home organizations
  - a. Potential questions are included in matrix tool
4. Compare how your needs match to different organizations.
5. Make a selection
6. Discuss and sign MOU