

GOVERNANCE

Phase II: Stabilizing Governance



Activity: 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.

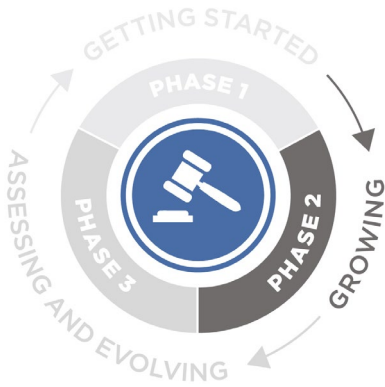
Programs have a range of needs. You might want to consider a smaller set of services or a larger scale relationship.

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: 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