GOVERNANCE
Phase II: Stabilizing Governance

Activity 14: Home Organization – Requirements Gathering and Assessment

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

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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](http://example.com) 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