GETTING STARTED

PHASE 1

PHASE 3 · PHASE 2

ASSESSING AND EVOLVING · GROWING

It Takes a Village

Open Source Software Sustainability

RESOURCES

Phase I: Creating Consistency

Activity 5: Organizational Home Program Services Matrix

Goal

Determine which services are important for your program as you evaluate home organization options.
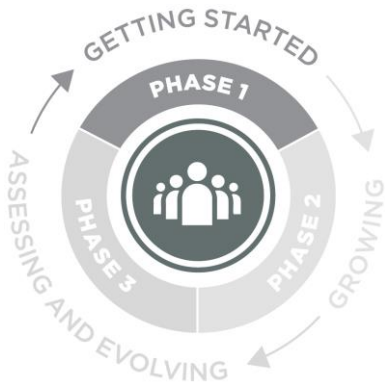
Prerequisites

None

Who Should Participate?

Program Leadership (strategic thinkers)

Length

30-60 minutes

Activity Instructions

1. Use the following matrix to determine which services are important for your community and your program, now and in the future. Feel free to customize the matrix (add or remove services) to better reflect your program's needs.

2. For each element on the list, select "Yes", "No" or "Maybe Later"

3. Once that is complete, rank each using the following values:

   2 = Very Important; 1= Somewhat Important; 0 = Not important

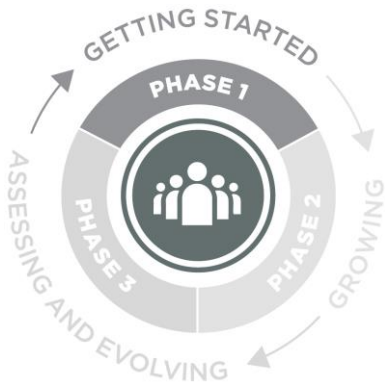4. Use the results of this activity for Activity: Organizational Home Requirements Gathering and Assessment

Activity 5: Organizational Home Program Services Matrix

What Services Does Your Program Need?

A sample list of services is included below. Feel free to customize the matrix (add or remove services) to reflect your needs.

Legal Services / Human Resource Infrastructure		Yes	No	Maybe Later		Rank
	Administration – legal entity and business support services					
	Legal advice					
	Asset stewardship: copyrights, trademarks, domain names, physical computer equipment					
	Contract negotiation and execution					
	Intellectual property rights (IPR) management					
	Recruitment, personnel management					

Financial Infrastructure		Yes	No	Maybe Later	Rank
	Invoicing				
	Fundraising				
	Accounting				
	Financial reporting				
	Separate financial accounts for programs				
	Grants management				

Sustainability Infrastructure		Yes	No	Maybe Later	Rank
	Future proofing				
	Consulting				
	Mentorship				

Activity 5: Organizational Home Program Services Matrix

Collaboration & Partnerships		Yes	No	Maybe Later		Rank
	Leadership mentoring, advice, and guidance					
	Partners					
	Grant support (writing, administering)					

Community Infrastructure		Yes	No	Maybe Later	Rank
	Communications infrastructure				
	Newsletters				
	Wiki spaces				
	Listservs				
	Meeting infrastructure				
	Webinar platforms				
	Officiating community elections and ballot initiatives				
	Marketing and communications				

Technical Infrastructure		Yes	No	Maybe Later	Rank
	Technical leadership				
	Hosting services				
	Technical support				

Other		Yes	No	Maybe Later	Rank