

# RESOURCES

## Phase I: Creating Consistency



### Activity 6: Organizational Home Requirements Assessment

#### Goals

1. Determine if your program would benefit from partnering or contracting with an organizational home or fiscal sponsor
2. Gather requirements for assessment and decision

#### Prerequisites

[Activity: Organizational Home Program Services Matrix](#)

#### Who Should Participate?

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

#### Length

90-120 minutes

#### Definitions

Programs have a range of business needs depending on their scope and scale. These needs may require only a small set of services from an outside organization, or a larger-scale, longer-term relationship. The terms and definitions below may help you in your assessments.

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

- **Example situation:** grant funded program that needs a way to accept funds

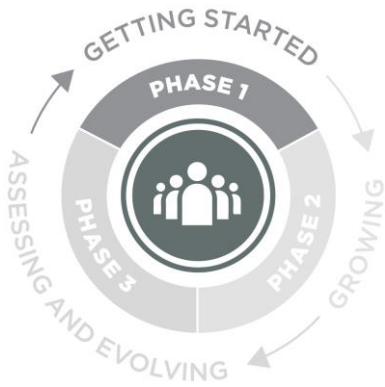
**Organizational Home:** an organization that provides legal and financial infrastructure as well as additional services that may be important to your program, such as consulting, event facilitation, marketing, technical support, grant writing, etc.

- **Example situation:** emerging program growing from a grant-driven initiative to a program that is community-based needing to move out of their founding organization

#### Activity Instructions

##### Requirements Gathering

1. Based on previous ITAViP activities, determine your program's biggest unmet needs. This will enable you to determine any gaps with your current situation and evaluate how a new home organization or fiscal sponsor could help.
2. Determine what gaps can 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:
  - a. Impact to existing staff (i.e. if they cannot move to the new organizational home with the program, will they remain as volunteers? How will they be recognized for their contributions?)
  - b. Current sponsoring organization's change in role (e.g. lesser role in governance).
4. Gather a list of candidates for a new home organization



# RESOURCES

## Phase I: Creating Consistency



### Activity 6: Activity: Organizational Home Requirements Assessment

#### Assessment

1. Determine criteria for selection. Examples include:
  - a. Match in core values
  - b. Service offerings (see Activity: [Organizational Home Program Services Matrix](#))
  - c. Financial health and stability
  - d. Reputation (using references, world/national ranking, awards received?)
  - e. Terms and conditions
2. Compare how your values and service needs match to different home organizations. You can use the related tool [Organizational Home – Requirements Gathering and Assessment Scoring Tool](#) to help with comparison.
3. Compile a short list of potential new home organizations
4. Discuss/Interview with potential new home organizations
5. Make a selection
6. Discuss and sign an MOU or Partnership Agreement.
  - a. An excellent Partnership Agreement template can be found under the heading “Partnering Agreements,” in Brouwer, Herman and Woodhill, Jim, with Hemmati, Minu, Verhoosel, Karèn and van Vugt, Simone (2016) *The MSP Guide, How to design and facilitate multi-stakeholder partnerships*, Wageningen: Wageningen University and Research, WCDI, and Rugby, UK: Practical Action Publishing, <http://dx.doi.org/10.3362/9781780446691>.