Activity: 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
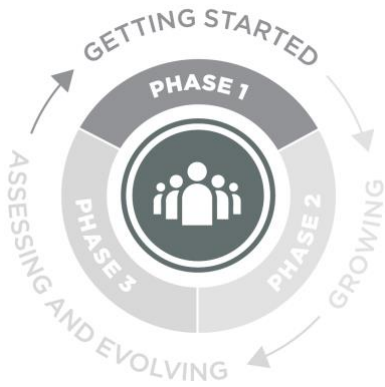
Activity: Activity: Organizational Home Requirements Assessment

<u>Assessment</u>

1. Determine criteria for selection. Examples include:

   a. Match in core values

   b. Service offerings (see Activity: Program Services Evaluation 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.