RESOURCES
Phase II: Diversification

Activity: Creating a Registered Service Provider Agreement

Goals
1. Identify the elements in a registered service provider agreement that are important to your program
2. Create a draft registered service provider agreement to share with program leadership

Prerequisites
It’s recommended to complete Resources Activity: Vendor/Service Provider Landscape Analysis. This activity assumes that your program has identified service providers to work with.

Who Should Participate?
Program management (tactical)

Length
60-90 minutes

Activity Instructions
1. Review the tables of benefits and obligations below and note whether the benefit/obligation is one your program will or will not include in an RSP agreement. Feel free to add additional elements to the table.

2. For those benefits/obligations that are included, discuss what that will look like for your program; discussion prompts include:
   a. Are there limitations on the benefit or obligation? For example, if a benefit is receiving technical support, is there a ceiling on the number of hours?
   b. Are the benefits limited to RSPs or are they available to others? For example, may everyone using the platform participate in governance, or only members / contributors?

3. Compile the benefits and obligations into a single document to share with program leadership, legal, and fiscal counsel.
   - Note: Keep any draft registered service provider agreement as simple as possible - the more tiers, parameters, and requirements added increase the administrative burden for both organizations and make it less likely that potential RSPs will see the benefit in becoming “official.”
## RESOURCES

**Phase II: Diversification**

### Activity: Name

#### Benefits provided to RSP by Program / Organizational Home

<table>
<thead>
<tr>
<th>Benefits</th>
<th>Will have</th>
<th>Won’t have</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access to documentation (developer, and/or end user)</td>
<td></td>
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<tr>
<td>Access to listservs and other engagement platforms</td>
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<td>Access to technical support</td>
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<tr>
<td>Eligible to participate in governance</td>
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<tr>
<td>Able to use program’s logo and/or branding</td>
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<tr>
<td>Official listing as RSP on program website, other CE platforms</td>
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<tr>
<td>Certification / credentials (i.e., RSP can say they are certified by the program’s home organization)</td>
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</tbody>
</table>

#### Registered Service Provider Obligations

<table>
<thead>
<tr>
<th>Obligations</th>
<th>Will have</th>
<th>Won’t have</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fees</td>
<td></td>
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<tr>
<td>• Tied to anything? Size, in-kind contributions, # of members recruited, etc.</td>
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<tr>
<td>• How often are fees paid? One-time? Annually?</td>
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<tr>
<td>Custom code contributed back to program (program not obliged to accept)</td>
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<tr>
<td>Open-source licensing</td>
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<tr>
<td>Limit outreach to certain domains/locations</td>
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</tbody>
</table>
RSP Services Provided

Your program may decide that they would like to limit registered service providers to certain services, or only work with providers that support certain services. In that case, use the following table to note which services your program would / would not like an RSP to provide.

<table>
<thead>
<tr>
<th>Service</th>
<th>Must Have</th>
<th>Must not Have</th>
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</thead>
<tbody>
<tr>
<td>Installation and configuration</td>
<td></td>
<td></td>
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<tr>
<td>Data conversion and migration</td>
<td></td>
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<tr>
<td>Software design and development</td>
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<tr>
<td>Integration development/support</td>
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<tr>
<td>Reporting and analytics</td>
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<tr>
<td>Cloud hosting and/or SaaS</td>
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<tr>
<td>On-premises support</td>
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<tr>
<td>Consulting and analysis</td>
<td></td>
<td></td>
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<tr>
<td>Training</td>
<td></td>
<td></td>
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<tr>
<td>Customized solutions</td>
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</tbody>
</table>