

ITAViP Toolkit: Resources

Resources

This section of the toolkit is focused on activities that will help you with establishing, stabilizing, and evolving sustainable resources for your program. It is designed to help you structure discussions and gain consensus about next steps for sustainable technology for your OSS program.



Definition: In order to launch, grow, and thrive, OSS programs need resources both human and fiscal. Human resources encompass engineers writing code, community members providing use cases, colleagues or consultants providing assistance with strategic planning, or organizational homes with fiscal stewardship. Financial resources come in and go out in a wide variety of ways - in via contributions, grants, dues, sponsorships, etc., and out via salaries, servers, telecommunications, and overhead.

Instructions

Brand new to *It Takes a Village in Practice*? Review the activities and goals below to select ones you want to use for sustainability planning.

These activities are designed to help you move from one phase to the next and can be used in any order. You can use any or all of them. As you use them, we are eager for feedback via ITAV@lyrasis.org

Phase 1: Creating Consistency			
Phase 1 Objectives include: Undertake business and financial sustainability planning, Determine human resources needed to move forward, and Explore partnerships and collaborations			
1. Landscape Analysis	Goals: Understand where your program fits in the competitive landscape; Use results to innovate, make decisions, identify opportunities for collaboration, increase usefulness/effectiveness of your platform Related Objectives: Undertake business and financial sustainability planning	D OC	P DF
		Ac tivity	Ac tivity
		Te m plate	Te m plate
2. Understanding Financial Resource Models	Goals: Understand the range of various financial resourcing models and how they function; Understand what adopting different resourcing models could mean for your own program; and Narrow the range of potential resourcing models / revenue-generating activities for your program to consider Related Objectives: Undertake business and financial sustainability planning	D OC	P DF
3. Human Resources Required	Goal: Identify the human resources required to support program goals and strategies Related Objectives: Determine human resources needed to move forward	D OC	P DF
4. Value Propositions for Job Descriptions	Goals: Create a value proposition for a new program position (e.g. community manager, technical lead) to help articulate significance of allocating resources to program leadership; and optionally Create a job description for a new program position Related Objectives: Determine human resources needed to move forward	D OC	P DF
5. Organizational Home Program Services Matrix	Goal: Determine which services are important for your program as you evaluate home organization options Related Objectives: Explore partnerships and collaborations	D OC	P DF

6. Organizational Home Requirements Gathering and Assessment	Goals: Determine if your program would benefit from partnering or contracting with an organizational home or fiscal sponsor; Gather requirements for assessment and decision Related Objectives: Explore partnerships and collaborations	D OC	P DF
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Phase 2: Diversification

Phase 2 Objectives include: Expand community of funders and contributors, Work with vendors to support development needs, and Cultivate expectations around community contributions

7. Diversifying income streams	Goals: Identify strengths and weaknesses of your program's current revenue-generating activities; Evaluate and prioritize new revenue-generating models for potential addition to your program's portfolio Related Objectives: Expand community of funders and contributors	D OC	P DF
8. Adjusting existing revenue streams	Goals: Identify revenue-generating activities that can be improved, Develop strategies for improvement Related Objectives: Expand community of funders and contributors	D OC	P DF
9. Discontinuing existing revenue streams	Goals: Identify revenue-generating activities that can be discontinued, Develop a plan for gaining approval from governance / leadership Related Objectives: Expand community of funders and contributors	D OC	P DF
10. Expanding your contributor community	Goals: Understand the range of various contribution methods and support systems and how they function, Understand what adopting different contribution methods or support systems could mean for your own program, Identify one or two new contribution methods or support systems for your program to pilot Related Objectives: Expand community of funders and contributors	D OC	P DF
11. Vendor / Service Provider Landscape Analysis	Goals: Identify the vendor/service provider ecosystem in your domain, Use results to identify opportunities for collaboration or partnerships Related Objectives: Work with vendors to support development needs	D OC	P DF
12. Creating a Registered Service Provider Agreement	Goals: Identify the elements in a registered service provider agreement that are important to your program, Create a draft registered service provider agreement to share with program leadership Related Objectives: Work with vendors to support development needs	D OC	P DF
13. Building Welcoming Communities	Goals: Identify what documentation your program has that supports growing a successful community, Prioritize missing documentation and develop a plan for its development Related Objectives: Cultivate expectations around community contributions	D OC	P DF
14. Determine New Forms of Community Engagement	Goals: Get beyond one way communications and start to create infrastructure for more interactive engagement with current and potential community members, Determine what kind of engagement is right for your community, Map stakeholder groups with nascent activities you want to support Related Objectives: Cultivate expectations around community contributions	D OC	P DF

Phase 3: Stable, but not Static

Phase 3 Objectives include: Focus on alliances and partnerships with leading institutions, Shift business model in response to external events, Calibrate revenue streams to a global economy

15. Alliances and Partnerships Landscape Analysis	Goals: Identify desirable characteristics for potential ally/partner organizations to have, Identify potential ally /partner organizations with desirable characteristics Related Objectives: Focus on alliances and partnerships with leading institutions	DOC	PDF
16. Value Propositions for Alliances and Partnerships	Goals: Identify program strengths that would be attractive to new partners, Create value propositions to share with potential new partners Related Objectives: Focus on alliances and partnerships with leading institutions	DOC	PDF
17. Developing an Evaluation Plan for Alliances and Partnerships	Goal: Develop a plan for evaluating existing alliances and partnerships Related Objectives: Focus on alliances and partnerships with leading institutions	DOC Acti vity Tem plate	PDF Acti vity Tem plate
18. Context Mapping	Goals: Evaluate resource plans in response to the broader trends in the domain the program serves, Underst and how changes in the environment may affect long-term sustainability Related Objectives: Shift business model in response to external events	DOC	PDF
19. Global Outreach and Scaling Kickoff	Goal: Determine whether your program should devote resources to exploring global scaling or expansion Related Objectives: Calibrate revenue streams to a global economy	DOC	PDF

20. Global Outreach and Scaling Milestones and Activities	Goals: Identify and prioritize milestones and next steps for global scaling or expansion planning, Identify program staff/stakeholders responsible for moving forward Related Objectives: Calibrate revenue streams to a global economy	DOC	PDF
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