



**SOCIAL IMPACT
COMMONS**

Organizational Health + Impact

Frameworks for Fiscal Sponsors



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Why Impact?

Value Proposition - We see three principle reasons for undertaking this research:

- Advocacy: There is a tremendous need/opportunity to make the case of fiscal sponsorship for the nonprofit sector as a whole, funders, donors, and policy/law makers to encourage more practice of fiscal sponsorship and motivate greater direct investment in fiscal sponsorship capacity.
- Benchmarking: Fiscal sponsors thirst for comparative or field-wide data in order to compare performance and impact and place their work in the context of the field.
- Organizational Assessment: Finally, aside from comparative analysis of performance, fiscal sponsors could use this data to support internal planning and individual theory of change development work.



Audiences

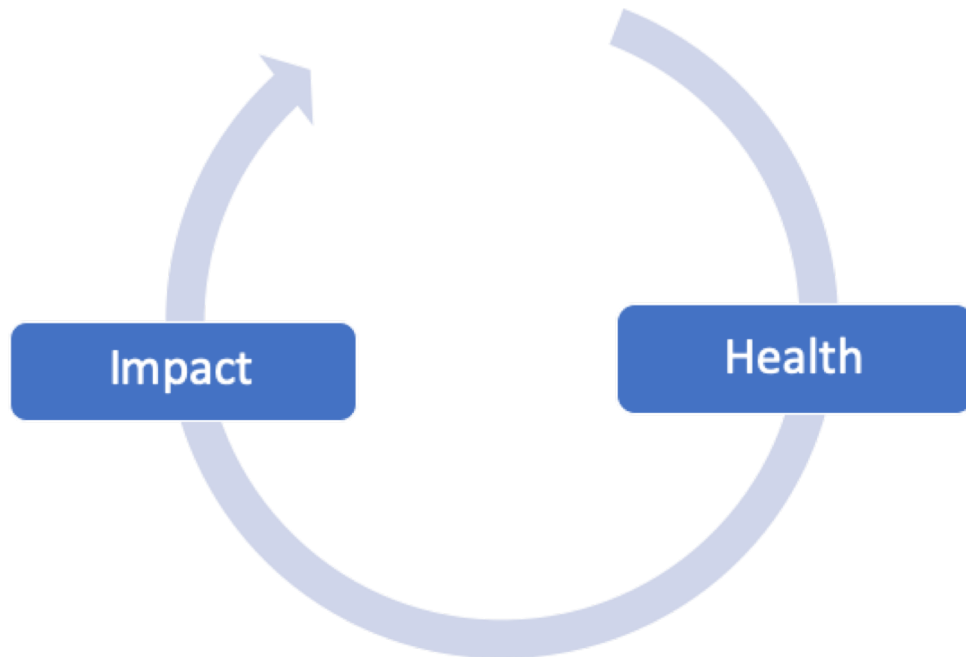
Audiences - There are four principle audiences for this work, in no particular priority order:

- Fiscal Sponsors: Whether established or aspiring, we hope this data will help fiscal sponsors achieve a sense of bearing and orientation among peers.
- Nonprofit Leaders: If fiscal sponsorship wishes to grow as a field, it needs to build greater awareness among nonprofit leaders (management, governance, entrepreneurs, etc.) and convince them of the potential benefits of sharing resources.
- Funders: Despite rising awareness and knowledge of fiscal sponsorship among institutional funders, including government, there is a great deal of education and advocacy still to achieve.
- Policymakers & Regulators: Lastly, there are government policymakers, regulators, and sector watchdog organizations (such as Charity Navigator and CANDID) who need more data on the field to include it in policy and regulatory matters.



Health vs. Impact

Organizational **health** and **impact** are two sides of the same coin. They should reinforce each other in a virtuous cycle.



Health answers a range of questions related to, *“How much are we doing, and how well are we operating?”*

Impact answers a range of questions relate to, *“How well are we supporting the capacity of our projects?”*



Health Assessment Assumptions

There are many organizational health frameworks and motivations in the nonprofit sector: benchmarking, case making, strategic planning, governance oversight.

Our proposed Health Assessment is focused on the following values/assumptions:

- Fiscal sponsorship resists “standardization”, beyond the most basic legal, financial, and compliance practices and principles.
- The goal of assessment therefore is *awareness* and *intentionality* of practice and cultivating a *whole systems* view of our work.
- Assessment is best when it is undertaken in a 360-degree manner: self and stakeholders.



Commoning as a Framework

Commoning Practice

In the interest of centering equity, diversity, and inclusion in our work...

Our approach to *fiscal sponsorship practices* is infused with principles of *commoning*, or ***commons management***.

The field of commoning practice has a long history and is enjoying renewed interest, as it concerns more equitable and participatory management principles focused on mutual care and economic self-sufficiency.

Our model of commoning, applied to the fiscal sponsorship field, is lightly adapted from the work of Silke Helfrich and David Bollier and their notion of the “commoning triad”.

Commons Management



Prospective Health Assessment Areas

Commons Resources

- How clear and transparent are you in defining services and shared resources?
- What is your commitment to practices that foster access, equity, diversity, and inclusion?
- Do you track key financial/operational performance indicators and have an overall project portfolio strategy?
- How well do you support your project and sponsor staff (compensation, wellbeing, retention, and development)?
- Do you maintain quality, consistency, and resiliency of systems: people, facilities, and technology?

Peer Governance

- What is the level of involvement of constituents (project leadership) in governance?
- Is there any level of involvement of constituents in key management and business decisions?
- How transparent are you around policies, practices, and risk factors that affect your projects?
- How much mutual trust is there between/among project leadership, board, and staff?
- How effective and transparent is your governance process?

Community & Learning

- Do you foster and articulate shared values and commitments within your community?
- Are you committed to anti-oppression and restorative practices in all aspects of your work?
- Do you facilitate connections and relationships among projects and community stakeholders?
- How dedicated are you to ongoing learning among projects, staff, and board alike?
- Do you actively engage/share with your wider peer group/community?

NOTE: The above are not intended as *actual* assessment protocol questions, but questions that define topics areas for investigation.



Impact Assessment Assumptions

We define organizational impact for a fiscal sponsor as most coherently situated in the relationship between *sponsor* and *sponsee*.

The impacts your *projects/partners* have on *their* beneficiaries are too diverse to consolidated into a unified theory of change or impact model.

Sponsor-sponsee-level impacts might include:

- Diversity, Equity, Inclusion, and Access

- Key Financial Activity Indicators

- Employment & Economic Impact

- Overhead/Back Office Efficiency

- Project Personnel Wellbeing



Impact Model Questions

Some questions to consider, *if* we are looking at the sponsor-sponsee relationship as the location of impact and any theory of change:

- Is the principal (ultimate) impact of fiscal sponsors on the *people* who staff our many projects (i.e., helping those doing the direct charitable work)?
- Are other impacts equal in significance, such as economic impact?
- Should we be looking at a framework that is both *direct* (impact on projects) and *indirect* (impact of projects on their constituents)?





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