



**SOCIAL IMPACT
COMMONS**

Expanded Co-management

The Next Frontier for Fiscal Sponsorship



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What's core?

Fiscal sponsors offer a diverse range of services to their projects, but across the field there is *general* agreement on “core” services that are intrinsic to the model.

These are services that are intimately tied to the value proposition and legal structure of the sponsor-sponsee relationship. Services that may be viewed as discrete are bundled, because it's not possible (or prudent) to separate them.

Assuming “Models A/L” to be the most intimate and comprehensive core relationship with other models offering subsets of services, the “core” services are:

- General Strategic Advice/“Account Management”
- Accounting & Financial Management
- Regulatory & Tax Compliance
- Insurances (GL/D&O)
- Legal & Transactional Support
- Employer of Record



What's additional?

Outside of core services, what else surfaces as needs among sponsored projects?

Here are some examples of additional shared management services we've encountered...

- Fundraising and marketing support (advancement)
- Membership and constituent management (CRM)
- Strategic sourcing and purchasing
- Enhanced HR support, such as executive coaching/team building
- Strategic and other types of planning and assessment
- Theory of change/impact model development
- Constituent research and impact assessment
- Inventory and fulfillment management
- Property management



Considerations for additional services

One of the core challenges with additional services is that they are unlikely to represent *proportionate (transactional) demands on capacity* (not all projects will need the service). Financial and operating considerations include...

- **How do you allow for customization in scope of support from project to project?**
- **Is there enough project/community demand to warrant implementing new services?**
- **How can it be priced to mesh well with existing pricing and billing practices?**
- **Will the new service entail new/more complex relationships with project stakeholders?**
- **What staffing, cultural competency, operating systems, policies, and practices will be needed?**
- **How much time and capital investment will be required to evaluate success?**



Design and capitalization Options



Sponsor Designed

Service design by sponsor and most/all funds raised by the sponsor to capitalize the new service.



Community Informed

Sponsor seeks significant input into the service and shares fundraising work with projects.



Community Designed

New service is entirely designed by projects and is collectively capitalized by contributions of time and funds from projects.





Thaddeus Squire, Chief Commons Steward
thaddeus@socialimpactcommons.org
215 760 1634

Asta Petkeviciute, Chief Financial Steward
asta@socialimpactcommons.org
617 448 9559

Josh Sattely, Chief Legal Steward
josh@socialimpactcommons.org
603 731 7401

<http://socialimpactcommons.org>

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