

Organizational Models to Support Emerging Ideas and Social Innovation

Community
Foundations of Canada
October 7, 2008
Montreal, Quebec

sage centre



THIRD SECTOR
New England

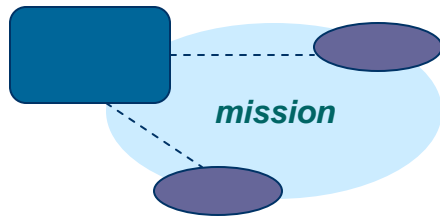
Agenda

- **Fiscal Sponsorship or Shared Charitable Infrastructure – What is it?**
- **Perceptions in the Philanthropic Sector**
- **Uses & Benefits**
- **Sage Centre – a Canadian model**
- **Third Sector New England – a US model**
- **Q&A / Discussion**

Fiscal Sponsorship

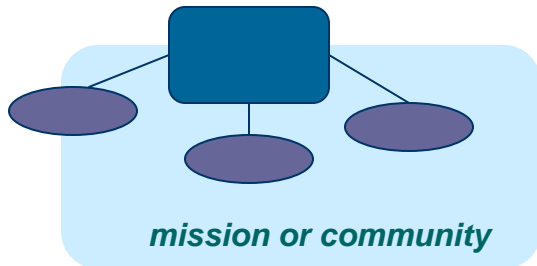
“An established charity agrees to accept and manage charitable funds for another.”

Scope of Fiscal Sponsorship



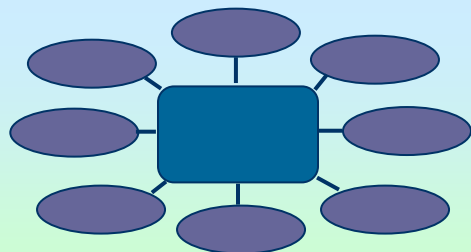
Informal Sponsors

- Support a *few* projects with legal &/or admin services
- Tend to be charities that support other closely affiliated mission-focused projects



Community Foundations

Seek to enhance community or mission focus footprint through sponsorship of associated projects



Comprehensive Fiscal Sponsors

- Exist *primarily* to provide legal status and admin services to projects of all sizes and life stages
- Realization of nonprofit mission *is* their mission

Not Just for Project Incubation

- **Incorporation = projects & their leaders now responsible for**
 - financial management
 - benefits administration
 - human resources
 - legal and compliance services
 - risk management.
- **Attention diverted from mission-critical work**
- **Nothing inherent in fiscal sponsorship confines its value to start-up endeavors**

More Than Financial Management

Comprehensive Fiscal Sponsorship

Financial Management

HR Management

Grants Administration

Business Administration

Capacity Building

Accounting

Review Grants

Insurance

Program Assessment

Revenue

Grant Contracts

Compliance

Leadership Training

Annual

Benefits

Track Restrictions

Regulatory

Technology Consultation

Payroll

Health, Safety

Funder Financials

Strategic Planning Guidance

Receipts

Employment

Audits

Advisory Board Development

Beyond Moving Money

A fiscal sponsor:

- Sets expectations, monitors activities
- Ensures compliance
- Builds organizational capacity

Benefits

- **Drives social innovation**
- **Enables stronger initiatives**
- **Reduces cost, duplicative investments**
- **Enhances infrastructure**
- **Manages risk**
- **Improves quality**
- **Creates community**

➔ **These benefits translate into accelerated social change**

Funders select fiscal sponsorship for...

- **Governance, accountability, transparency**
- **Support for limited/inexperienced staff**
- **Inclusive participation**
- **Leverage funding dollars**
- **Need for a neutral third-party home**
- **To create a project to meet their goals**

“At least 15% of my time—time I would have had to spend on administrative work—is put into fundraising, management, programming and other critical activities.”

Hez Norton
Resource Generation
a project of TSNE

Sage Centre

We are a federally registered charity working on:

- **Conservation**
- **Education and Research (Environment & Social Justice)**
- **Leadership Development**
- **Civic Engagement**
- **Charitable Capacity Building**

We support 34 projects with 37 full-time staff
and 88 part-time

Overall budget of \$8m

sage centre



Sage Projects

- ❑ Community Collaborations
 - **York Region Alliance to End Homelessness**
- ❑ Coalitions
 - **Halifax Initiative Coalition**
 - **Rainforest Solutions Project**
- ❑ Pilots
 - **National Green Legacies**
 - **Water Loss Initiative**
 - **Capacity Waterloo**
- ❑ Time-limited Initiatives
 - **Northern Rivers Initiatives**
 - **BC Marine Conservation Analysis**
- ❑ International Organizations with projects in Canada
 - **ForestEthics Canada**
 - **Island Conservation Canada**
- ❑ Great Ideas (individuals or groups)
 - **Centre for City Ecology**
 - **Reel Youth**

Sage Project Directors



“I see so many senior managers of NGO’s spend enormous amounts of time on administration, and we are a campaign driven organization, we should be spending our time on our core mission. Until Sage came along there was no back up support. When we needed cheques cut, health insurance coverage etc, there was no one there to help.”

Tzeporah Berman
ForestEthics Canada

sage centre

Sage Project Directors

“Sage Centre has allowed our very small staff team to be able to do the work we feel passionately about. For a reasonable cost Sage provides us with financial expertise and a legal home. Our coalition thrives in an atmosphere of collaborative leadership without the stress of establishing an infrastructure that might be perceived as competing with or depleting resources from member organizations.”

***Fraser Reilly-King
Halifax Initiative Coalition***



sage centre



Sage Project Directors



“In less than a year we have turned this event from a local initiative to an international phenomenon.”

***Jane Farrow,
Centre for City
Ecology/Jane's
Walks***

sage centre

Sage Project Size

Project Budget Size:

- 45% - \$250,000 or less
- 23% have no grant activity yet
- 18% - \$250,000 to \$1 million
- 14% - Over \$1 million

Information Sharing & Resources

sage centre



sage projects in action

- Project to Project Networking
- Project Access Only Website

project access [home]

- sage centre information
- roles and responsibilities
- charitable regulations
- fundraising / grants
- financial management
- human resources
- forms / templates
- resources
- directory of sage projects
- site map
- log out

May 2008						
S	M	T	W	T	F	S
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

7th	Payable Day
8th	Payroll Day
21st	Payable Day
22nd	Payroll Day

about this website

Welcome to the insider pages of the new Sage website. Here you will find tools and resources to help projects and Sage work together more efficiently.

Please take some time to review the [site map](#) and see what is now available on-line. All the common forms and templates that you need in your day to day administration work are posted as on-line forms or pdfs, depending on

announcements

Sage will post information here that needs to be communicated to ALL projects. Do you have something that needs posting? Send it to: patricia@sagecentre.org or rachel@sagecentre.org.

Thursday, July 31st, 2008
ONLINE DONATIONS with GIFTTOOL - Shared group discount rates for Sage Projects

sage centre



sage projects in action

project access [home]

- sage centre information
- roles and responsibilities
- charitable regulations
- fundraising / grants
- financial management
- human resources

home > resources

resources

Photo Sources for Nonprofits

Mondo Library
<http://mondolibrary.net/>

Its tag line is "public interest images for the nonprofit community." The collection isn't huge, but it

sage centre



Third Sector New England

- **Multi-service regional nonprofit capacity-builder**
- **Founded 1959**
- **Largest comprehensive fiscal sponsor in New England**
- **Other programs include**
 - Executive Transitions Program
 - Grantmaking for diversity, capacity building
 - Training, convening
 - Organizational assessments & management consulting
 - 120,000 sq. ft. Nonprofit Center in downtown Boston

sage centre

TSNE Fiscal Sponsorship Projects

- **Projects vetted for “social change” mission fit**
- **Must also satisfy funding, governance, leadership criteria**
- **38 projects with 33 FT staff and 93 PT**
- **\$9 million combined budgets**

Representative TSNE Projects

- Advocacy
 - **Voices From Inside**
 - **Conn. Network to Abolish The Death Penalty**
- Youth-serving
 - **Youth Workers Alliance**
 - **Boston Youth Organizing Project**
- Health
 - **The Access Project**
 - **New England SERVE**
- Philanthropy
 - **Sports Philanthropy Project**
 - **Resource Generation**
- Social Justice
 - **MataHari: Eye of the Day**
 - **Communities For Restorative Justice**
- Environmental
 - **Mass. Ocean Partnership Fund**
 - **The Carrot Project**

Sharing our Experience

- **National Network of Fiscal Sponsors (US)**
- **HRSD Canada Innovation Grant**
 - **Edmonton, Peel Region, Toronto (Youth Sector)**
- **Law Foundations of BC and Ontario – Legal Project**

Discussion Questions

- **Are there other shared infrastructure models in your own community?**
- **How can foundations work with their local communities to support new and emerging groups and ideas?**
- **How do we develop and share good practices and guidelines for this work across Canada (and the US)?**

Presenters

Doug Kerr, External Relations, Sage Centre

416.481.8652, doug@sagecentre.org, www.sagecentre.org

Jonathan Spack, Executive Director, Third Sector New England

617.523.6565, jspack@tsne.org, www.tsne.org