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A Conversation on Fiscal Sponsorship and Customer Service

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OUR TEAM
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How do you define “customer service”, and is the right concept?

Are fiscal sponsors in the business of customer service or is it something else?

How does customer service relate to risk and stewardship management of your community of projects?
It’s not just the moments of direct, 1:1 contact…

- Clarity, communication, and mutual comprehension of key policies, practices, and structures.

- Shared cultural norms, values, communication standards that influence how people relate to one another.

- Thoughtful approaches to rewarding, recognizing, and lifting up good communications, relationship and trust building.

- Clear practices for managing conflict or situations where the above norms and policies are broken (by both sides!).
It’s not one-size-fits-all…

- Scale of portfolio
- Model and level of support provided
- Staffing and project support approach

Simpler systems, policies, practices. Informal

More complex and articulated staff and systems

Size of portfolio, level of support, relative to staff and systems

Small Portfolio

Large Portfolio
QUESTIONS

● How do you define “customer service”, and is the right concept?

● Are fiscal sponsors in the business of customer service or is it something else?

● How does customer service relate to risk and stewardship management of your community of projects?
Patterns of Practice: Project Experience

Distributed ------------------------------to-----------------------------------------------Centralized

Project

FS Team

HR

Legal/ Grants

Finance

Other Supports

Lead

Finance

HR

Other Supports