



## CRITERIA FOR OWNING ORGANIZATION – **DRAFT**

The Shared Outcomes Measurement Workgroup recognizes that to create and maintain a longitudinal shared outcomes measurement system, there are certain criteria that an organization must possess. These criteria are as follows:

1. Commitment to continue long-term
2. Capacity to fundraise
3. Possibility of expanding regionally
4. Good relationships with players and stakeholders
5. Neutral (not self-serving and no conflicts of interest)
6. Expertise and capacity
7. Sustainable organization
8. Fundamental alignment with the mission of the project

In addition, the workgroup brainstormed various options of ownership of a shared measurement system. These options as follows:

1. Sonoma State University
2. Santa Rosa Junior College
3. Research University (i.e. UC Berkely, UC Davis, UCLA, UCSF, etc.)
4. County of Sonoma
5. Other Government (i.e. Federal, State, City)
6. Non-profit organization
7. Foundation
8. For-profit organization
9. Health district
10. National research institute
11. Evaluation company
12. Stand alone research institute
13. Hybrid model – research institute created in collaboration with existing non-profit or university

The grid on the following pages describes how each of the ownership options meets or doesn't meet the criteria decided upon.

	<b>Commitment to continue long-term</b>	<b>Capacity to fundraise</b>	<b>Possibility of expanding regionally</b>	<b>Good relationship with players and stakeholders</b>	<b>Neutral (Not self-serving and no conflicts of interest)</b>	<b>Expertise and capacity</b>	<b>Sustainable Organization</b>	<b>Fundamental alignment with mission of the project</b>	<b>Transparent</b>
<b>Sonoma State University</b>	Unknown	Has an academic foundation	Possibility to expand to other CSU	Limited engagement with Upstream Investments and other local initiatives		Limited evaluation and research capacity	Established 1961	Strong educational focus	
<b>Santa Rosa Junior College</b>	Unknown	Has an academic foundation	No, Localized to Sonoma County	Not engaged with Upstream Investments or other local initiatives		Limited evaluation and research capacity	Established 1918	Strong educational focus	
<b>Research University</b>	Likely to be interested in data results and long term outcomes	Likely know how to fundraise	Yes	Not engaged with Upstream Investments or other local initiatives		Ph.D. level research and knowledge	Likely	Depending on the focus areas of the research university	

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<b>County of Sonoma</b>	Yes, high interest but subject to financial priorities and political winds	Potentially through grants	Localized to Sonoma County, but with potential collaboration with other counties	Good relationships with many community organizations, but may seem “big brother”	Could be seen as self-serving by non-profits and other community organizations	Moderate evaluation and research capacity	High sustainability	Yes, Provides backbone for Upstream Investments	
<b>Other Government (Federal, State, City)</b>	Likely to be interested in data results and long term outcomes							Unknown	
<b>Non-profit organization</b>	Unknown	Likely, but potential to conflict with own financial priorities	Localized to Sonoma County; Some may have capacity to expand	Relationships will be dependent on the non-profit organization	Could be seen as self-serving by non-profits and other community organizations	Unknown	Vulnerable to economic downturns	Likely to have a very centralized focus	

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<b>Foundation</b>	Unknown	Yes	Localized to Sonoma County; Some may have capacity to expand	Relationships with donors, organizations, and private foundations	May be serving needs of donors		Long-term investment strategies		
<b>For-profit organization</b>	Unknown				Likely self-serving		Unknown	Profit of project may morph commitment to mission	
<b>Health Districts</b>	Likely to be interested in data results and long term outcomes		Yes, large regional networks	Would require building good relations	Potentially more interested in aspects of medical "health"	Moderate evaluation and research capacity	Subject to changing political and economic times	Common goal for healthy community	

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<b>National Research Institute</b>	Likely to be interested in data results and long term outcomes		Yes	Not engaged with Upstream Investments or other local initiatives	Potential conflict	Ph.D. level research and knowledge	Likely	Unknown	
<b>Evaluation Company</b>	Likely to be interested in data results and long term outcomes	Unknown	Yes	Not engaged with Upstream Investments or other local initiatives	Would need governance board for direction	Ph.D. level research and knowledge	Likely	Data and results driven	
<b>Stand alone Research Institute</b>	Yes, commitment will come from community support	Falls largely on expanding community support	Yes	Will build on current Upstream relationships and need to establish new relationships	Neutral; Will have representative Board of Directors and continuous community input	Can recruit Ph.D. level research and knowledge	Will develop sustainable business model	Exact alignment; Institute will be built to reflect project's mission	

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<b>Hybrid Model; Research Institute in collaboration with existing Nonprofit or University</b>	Yes, commitment would be requirement of collaboration		Yes	Hybrid model would be built on solid relationships	Yes	Partners could be selected based on expertise and capacity		Collaboration would establish aligned mission	