Guiding Principles for Partnership Fundraising

- A philanthropy department must be integrally involved in any decision to embark on joint fundraising. Project staff should refrain from offering or verbally committing to joint fundraising until they have reviewed ramifications with appropriate staff from philanthropy.
- Many potential partners see us as large organization with ready cash (or a broad donor pool to tap that is well outside their territory). Building their understanding about how we actually approach project fundraising (e.g. the important role of local donors) is an important early step in any discussion about collaboration.
- Only consider joint fundraising when it has potential to materially improve chances of meeting a fundraising goal -- or when maintaining or building a relationship with a critical partner requires it. Such collaborations should be clearly delimited and project-based, rather than attempting to jointly raise money for general operations.
- Rather than focusing on developing respective “don’t touch” lists, focus on how you can ‘enlarge the pie’ by maximizing total donor contributions.
- Trust issues will naturally be more sensitive when one partner is perceived as a newcomer threatening to draw donors away from an established, but smaller, local organization. It’s important to sit down with partners to begin process of building trust, even if in the end a decision is made to fundraise separately.
- Trust issues may be much less sensitive with a partner whose mission (and donor base) is significantly different than ours (eg. dance camp or community supported agriculture organization). Less territoriality and less concern with who claims credit.
- Whether fundraising separately or jointly, funders may respond better if the respective roles of different organizations are made clear, distinct, and complementary.
- Issues that were not clearly agreed to in advance (ideally in writing) can lead to misunderstanding (and worsened relations) later on. As these issues fester, getting resolution can be slow and divisive.

Recommendations

Seriously consider alternatives to joint fundraising:

- Offer technical assistance in fundraising to help partners reach their own goal, just as we offer technical assistance in land protection and stewardship. This has the potential to build some lasting capacity for them to tackle future deals too.
- Where a partner is pursuing action that is compatible with portfolio objectives, consider lending scientific comment and support to their case statement, even if we don't jointly fundraise

If joint fundraising is undertaken, follow these best practices:

- Stay abreast of policies on 'brand-sharing' and be sure to comply.
- Especially on big or complex projects, clearly agree on a unified conservation vision and outcomes and strike a framework that gives respective parties a real role and a real stake in the project that meets their respective needs.
- An MOU – or at least a basic memo – should definitely be developed. Obsessing over a big legal document may not be necessary (and could be off-putting to smaller partners), but having a clear understanding written down gives everyone an objective reference when questions or conflicts arise, which is especially important if there is turnover in staff or volunteers.
- Make sure to address contingency plans. How will any shortfall be made up? Will one organization cover the other(s)' shortfall? If raising money for a warchest, what will happen if a particularly costly project develops in the middle of it?
- Ideally, break the project into separate components so that our piece can go forward even if partner can't complete theirs.
- Have one organization clearly in the lead in a campaign, to call the shots – or at least agree on how differences in opinion will be resolved.
- Make sure contributions are coded or otherwise designated to the specific campaign, so that project gifts are not co-mingled with general funds of either organization.
- It is generally best to have one organization serve as the "banker", so that all checks are made payable to a single organization which also manages tracking as otherwise agreed. (Note: Some donors more allied with the 'non-banking' partner may balk at this. If this arises, special arrangements should be made for those donors.)
- Clarify which organization(s) has responsibility for donor tracking and follow-up stewardship.
- Specify how information on gifts and donors will be shared. To avoid future upsets and misunderstandings, specifically discuss and agree on terms for each organization's "ownership" of names after the campaign (i.e. for future cultivation/solicitation by the organizations acting independently.)
- Be very clear with the donors about the respective roles of the partners so that donor intent is scrupulously honored.

- A joint ask can be very powerful, but must make sense to the donor. A strong case statement explaining why each partner is involved is critical, as is vocal and visible representation from both groups in each major solicitation – preferably involving Board level volunteers.
- Since credit-claiming is a frequent cause of hard feelings, explicitly address a public relations plan. Remember also that if we want to be given recognition and credit from partners, we have to give credit liberally ourselves.
- Avoid joint fundraising letters as much as possible, as letters in general don’t have a great yield, and may not be worth the tricky aspects of a joint appeal.
- Don’t’ agree to begin without having worked out all the details. Be really clear about scope and terms. (e.g. Is the campaign restricted to a particular land deal, or can it be used for other conservation projects? In one town, though the Town’s initial overture was to do 50% of the fundraising, it turns out that both your organization and the Town were counting on the same donor to contribute to their respective shares.)