**Suggested Guidelines for Collaborative Fundraising Campaigns**

**Benefits**

* Collaboration allows for creation of a more comprehensive project
* Collaboration promotes learning from one other and sharing
* Comprehensive projects MAY attract bigger funders and larger grants and collaboration is important to some funders
* Collaborating often avoids duplication
* Collaborations can give funders a better ROI
* Collaborations can often create opportunities for sharing staff and leadership resources
* Joining a collaboration can increase organizational credibility
* Being part of a collaborative efforts provides a new platform of support among collaborators

**Challenges**

* Conflict can occur if a process for setting priorities and raising and allocating funds is not agreed upon in advance by stakeholders
* Coordination of joint fundraising can be difficult and time consuming
* Joint projects can involve complicated financial management – need for lead agency
* Joining a collaborative fundraising project can mean less flexibility for individual organizations in setting their own fundraising and organizational priorities
* Members may suffer financially if they typically seek individual funding from sources that are now targeted by or funding the collaborative

**Avoiding the Pitfalls….**

**Issues of decision making and control:**

Lack of clarity regarding decision making procedures can leave a vacuum or allow one or several organizations to dominate the collaboration. Sometimes smaller members feel they will have limited input, or larger ones feel that because they bring more resources to the collaborative, they should have greater influence on decisions – or receive a larger share of funds raised. Therefore, issues of control and decision making must be clearly addressed up front.

**Unrealistic or differing expectations:**

Unrealistic expectations can arise when organizations enter into joint projects without explicit, shared objectives. Organizations often begin joint needs assessment and planning in an atmosphere of "generosity and good will" but without a clear idea of where the collaborative is going. Priorities and expected roles should be clearly determined early on.

**Poor communication and coordination:**

Doing joint fundraising – and agreeing on the use of funds once obtained – requires consistent communication and coordination. The collaboration must present a united front and consistent and accurate information to the funder. Written materials need to be circulated and approved once developed, and further reviewed, changed and updated. All members need to be kept informed about progress and problems.

**Individual organizational interests:**

Each organization has its own priorities and needs outside of the collaboration. Participation in the collaboration may require financial and/or personnel resources and considerable time and energy.

**Unclear management responsibilities:**

Often, collaborative fundraising begins without a clear mechanism for oversight and financial management. Explicit agreements are needed to ensure that fundraising and communications responsibility is assigned to a staffed steering committee or leadership team. The role of the lead agency and/or the Steering Committee or Campaign Cabinet in hiring, supervising, evaluating, and, if necessary, terminating collaboration staff must be clearly stated.

**Getting Started**

1. **Set the scope and limitations of the collaborative fundraising goals and timeframe in a written agreement.**

* Identify the scope of all the projects that will be done jointly
* Identify priority projects (or defer to a project sub-committee)
* Identify individuals and/or funders who may be off limits for the collaborative effort
* Set goals and phases, if a long-term effort
  + Example: if joint funding will last take place over three years, have a three-year agreement. In the agreement, clearly state the scope of collaboration, the agreed-upon decision-making procedures, and how the collaboration will be implemented.
  + Be very clear on what fundraising will be done jointly and separately, and whether some funds will be used by the collaborative for staffing or if all funds will be allocated to members using a pre-determined process.
  + Specify the limits of collaboration, and address longer-term issues.
  + Will there be any limits to sharing of materials, concepts, and techniques that are developed jointly? Are organizations free to seek individual funding from a collaborative funder? Who makes decisions on such issues if they are not specified in the agreement?

1. **Decide on who will serve as the lead agency.**

* What entity will be receiving grants and gifts on behalf of the collaboration? Or should an outside organization, with strong fiscal capacity but no involvement in project implementation, be asked to serve as lead agency? Define the role of the lead agency in writing.

1. **Identify what decisions need to be made by the entire collaboration group and/or what sub-committees will be needed.**

* Determine who/what entity will be responsible for fundraising and management tasks. i.e., campaign cabinet or steering committee for quiet stage fundraising
* Will majority rule or consensus in decision making?

1. **Identify (hire) staff and identify and recruit volunteer leadership**

* Determine who is in charge of what, develop a campaign plan, and write job descriptions for staff and volunteers. It is very important to avoid the pitfalls of “rogue” fundraising!

1. **Agree on publicity process**

* Appoint a spokesperson and determine official wording for all media and presentations. Ensure that proposals, collateral materials, and public statements are agreed upon by all members, which increases the credibility and visibility of individual members; this requires deliberate planning and attention. It is extremely important to avoid “rogue” public relations!