

**Joint Fundraising Campaigns: Broad Themes and Lessons Learned**  
**Cape Cod Land Trust Conference, January, 2006**

- Multi-partner campaigns and community-based campaigns are inherently more messy and take more time. But sometimes they are the best (or only) way to accomplish your land protection goals.
- The decision to enter into a joint campaign is a huge one for an organization. Make sure those who need to be involved in the decision are at the table. Consider alternatives to joint fundraising wherever possible.
- A compelling land conservation opportunity combined with a creative partnership can motivate donors in ways that are beyond expectations (higher levels, broader support, sustained public focus) and can strengthen (and sometimes test!) relationships with partners
- Multi-partner campaigns require organizations to rethink traditional fundraising models and roles and adopt new models that provide for shared leadership. In a joint campaign, no single partner can dictate how things will be done. Flexibility is important. Roles and responsibilities must be agreed on (both internally and externally) and documented (preferably in writing), mindful that re-evaluation of these will likely be necessary throughout the campaign. Roles also need to be carefully articulated to donors.
- Developing trust among partners is essential. Identify a lead person at each organization to help ensure consistent communication. Check in regularly. No one should feel “out of it.” Don’t underestimate the additional time that will be needed for coordination among partners in a multi-partner campaign. Give more credit to your partners than they deserve; take less than you deserve.
- Committed volunteers bring passion and energy. They are often the ones for whom completion of the project is most important. It is important to cultivate their trust, passion, energy and creativity. "Loosening the reins" can often allow the overall effort to harness those attributes to maximum advantage. Working with volunteers also takes patience. Return their calls and emails promptly. Openly discuss trust and communication: How will organizations have confidence that a volunteer committee won’t damage reputations? How will volunteers have confidence they’ll be kept in the loop?
- While most funds will be raised as part of the campaign, organizations may be expected to contribute funds to the effort. Decide upfront whether, when and how you will do this.
- Grassroots fundraising can increase overall organizational support. Campaigns with many donors that care passionately and write many small checks are campaigns that provides the opportunity for many new members for an organization.
- Make sure everyone involved is unified on vision for the future ownership and management of the land.
- Keep your eye on the ball (success!) and don’t sweat the small things. Keep lines of communication open. Don’t let problems fester. Don’t send emails after midnight.

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## Checklist of Logistical Issues for Discussion Among Partners in Joint Campaign

### Land Deal

- Who signs the contract? Who gets what interest?
- Who takes the lead in communicating with the landowner?
- Who makes decisions regarding the deal? (e.g. extensions, title problems, etc.)
- Who is responsible for due diligence?
- If there is an “out” how will you ensure everyone understands it and is on board? (i.e. you haven’t raised enough money and need to sell a lot)
- Is there a shared vision for stewardship of the land (uses, management, trails, etc.)

### Fundraising Issues

- Are various organizations responsible for “shares” of the total or is everyone in until the total is raised?
- What is the fundraising goal? What campaign expenses are included? What land deal costs or “overhead” costs are included? Stewardship costs? Is everyone “on board” with the total amount to be raised?
- Are prospect/member lists shared? Do certain people ‘belong’ to certain organizations – e.g. trustees? Do some names need to be held or kept confidential for relationship reasons?
- Who maintains/updates the prospect list?
- Are solicitations sent jointly or individually?
- Who will checks be made out to? One organization? More than one?
- Who acknowledges gifts?
- Are lists of donors shared?
- How does this information get reported to partners? volunteers? How often?
- How is the confidentiality of donor information preserved? Anonymous donors?
- Who is responsible for donor stewardship?
- Who decides when to re-solicit donors?
- Can names be used in the future? Under what terms?
- Who decides what foundations/agencies to solicit? Who writes the proposals?
- How are conflicts addressed (e.g. an organization has needs for another project or same donor for another purpose)
- What duration pledges are acceptable? How are they acknowledged? How are “promises” kept track of?

### Accounting/Bookkeeping Issues

- Who keeps the books?
- If more than one organization can accept checks, how are the totals reconciled? How often is this done?
- Who keeps the “official” record of receipts?
- Who needs to approve campaign expenses? What is the mechanism for doing this?
- Will members of the committee be reimbursed for expenses?
- Who develops/maintains the budget?

### Campaign Materials (Press releases, pledge forms, case statements, flyers, packets, DVDs, etc.)

- Whose Letterhead? Whose Envelopes? Whose Postal Permits?
- What is the review and approval process for written materials?
- Web site – Hosted on one organization’s site? A dedicated site? Both? Links?
- Who updates the web site? Who pays any hosting costs?

### Campaign Organization

- Do you need a consultant? For what? How will they be paid?
- Where will needed expertise come from? PR, Event planning, Land negotiations? Fundraising?
- What is the campaign committee structure? (formal/informal, volunteers/staff, representative of each organization/partner, advisory board)
- How will the committee communicate? (emails, meetings, conference calls)
- What is the role of the committee? Are roles and responsibilities agreed upon and documented?
- Who takes responsibility for informing those who miss meetings? Who takes minutes?
- What authority does the committee have? How do volunteers relate to organizational partners?
- Is training available for volunteers?

### Decision making & Conflict Resolution

- Who ultimately calls the shots? (one organization, a steering committee of all partners?)
- Who is responsible for momentum and maintaining commitment over time?
- What mechanisms are there for resolving disputes among partners?
- How will you deal with lack of follow through? How are renegades reined in?