Background

Over the years, many regional and national philanthropy-serving organizations (PSOs) have explored the benefits and challenges of relationships between the two types of organizations. In March 2007, the Forum facilitated a dialogue to develop a protocol to guide how organizations interact when one group is planning an event within another group’s region. A working group consisting of staff from PSOs developed the following list of suggested activities and best practices for organizations to follow when planning an event.

This document has been modified over time to reflect the Forum’s name change and updated language about the work of PSOs.

Steps in the Planning Process

The purpose of this protocol is to provide guidance to organizations planning events in order to promote positive working relationships. It is a recognition that both sides gain more by working together in a cooperative manner.

Pre-Planning

The following steps should be followed at the beginning of the planning process, before the location and date of the event are confirmed. Establishing contact early on conveys a level of respect that will lead to positive relationships.

- When a national PSO identifies a city for an event, a staff member from the national PSO should inform the regional PSO that covers that city. A list of all regional PSOs and contact information can be found in the Forum’s Membership Directory. You can utilize the filters to further refine the list by geographic region.

- A regional PSO should inform the appropriate national PSO if they are planning a large-scale event (as opposed to a smaller seminar or conference session) related to the funder network’s area of focus (issue area, population, etc.). This notification process is not a request for permission; rather it is an acknowledgement of their expertise and a way to increase the effectiveness of the program.
□ Timeliness of communication is key. It is in everyone’s best interest to give as much notice as possible to maximize marketing and collaboration opportunities. The local/focus organization must recognize the time it takes to plan such an event and provide feedback to the planning organization in a timely manner, optimally, at least 12 weeks prior to the event.

□ The planning organization should be open to feedback from the local/focus organization as to the timing and location of the event. The local/focus organization is in the best position to inform the planning organization if the timing is not ideal and might have a negative impact on the planning process. If the event is to be scheduled at a time that conflicts with another major event, the planning organization should take that under consideration when setting the date for their event.

□ Both organizations should understand that this notification process does not necessarily obligate either organization to be an active participant in the planning of the event or in the event itself. There are several different ways that organizations can work together in order to ensure a successful event (see “Levels of Engagement” below).

Fundraising
Fundraising can be a sensitive area for discussion, and thus it is important for organizations to clearly communicate goals and intentions.

□ The planning organization should recognize the potential areas of overlap when engaging in local fundraising. It would be beneficial for planning organizations to inform the local organization of their fundraising plans prior to contacting local funders.

□ When feasible, the local organization should be open to offering guidance and advice to the planning organization related to the regional landscape for funding.

Levels of Engagement
There are several ways that PSOs can work together to ensure successful events. Engagement can range from a relatively low level of interaction to full partnerships. However, it should be noted that any interaction should be mutually agreed upon and beneficial to both sides. If a planning organization invites a local/focus organization to play a role in an event, that organization should view its participation as a way to promote philanthropy and/or raise awareness on an issue, not as a membership recruitment opportunity.

Potential areas of collaboration include:

1. **Notification:** At the most basic level, the planning organization should inform the local/focus organization of their event at the onset of the planning process, as outlined above. No other interaction is necessary unless both parties are interested in further collaboration.

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1 For the purposes of this discussion, the PSO that is planning the event will be referred to as the “planning organization.” The PSO that is located in the area in which an event will take place, or focuses on the topic or population is planning a major event, will be jointly referred to as the “local/focus” organization.
2. **Marketing**: The local/focus organization can offer to promote the event to their membership and/or other contacts in the community. Although not mandatory, this may include an agreement to offer that organization’s members a discount on registration for the event.

3. **Information Exchange**: The planning organization could include information about the local/focus organization in the event materials. This could also lead to a longer-term arrangement wherein each organization regularly includes information about the other in new member welcome packets.

4. **Planning Committee**: In order to benefit from their knowledge of the community or topic, a staff/board member from the local/focus organization may be invited to participate on the planning committee for the event.

5. **Session Planning**: The planning organization may invite the local/focus organization to plan a session for the event based on their geographic or subject expertise.

6. **Staff Assistance**: The local/focus organization may offer to support the planning organization by making a staff member available to assist with planning and on-site logistics.

7. **Co-sponsor**: At the highest level of interaction, a planning organization can invite a local/focus organization to be a full partner in an event, which may involve joint planning, marketing, funding, and cost and revenue sharing.

**Conclusion**

The goal of this protocol is to provide guidance to PSOs in planning major events. We encourage all organizations engaged in this process to follow these initial steps as a basis for collaboration, and then build upon them with more specific areas of interaction. Establishing realistic and mutually beneficial goals will help ensure a successful event and establish a positive relationship between organizations that can extend beyond the event itself.