**SOURCE:** [**Grantcraft**](https://learningforfunders.candid.org/wp-content/uploads/sites/2/2018/12/funder_collaboratives_secure.pdf)

**Nuts and Bolts: Questions to Ask and Answer Together at the Start**

The members of a prospective collaborative have a host of important decisions to make together. Experienced funders said that clarity on these issues early on is essential for good relations and success later on. Here’s a rough guide to aid the start-up process.

PURPOSE

* Are we interested in advancing an issue, a field, a strategy, or something else?
* On what level will we focus: local, state, regional, national, international?
* What are our short-term goals? What are our long-term goals? How long do we plan to operate?
* What are our core values and commitments?
* How will we safeguard the interests of grantees; for example, will we require that donors commit “new” money?
* Are we interested in influencing other funders by educating them about an issue or strategy, alerting them to opportunities, or encouraging them to work in alignment?

OPERATIONS

* What type of collaborative do we want? A learning network? Strategic alignment? A pooled fund?
* Should we hire full or part-time staff or an intermediary to coordinate the work? Consultants?

MEMBERSHIP

* Should we limit the size of the membership or involve as many funders as possible?
* Who will be eligible to participate: foundations, individual donors, governments, others?
* Are we aiming for a range of members: for example, small and large, national and local, private and corporate?
* Will nonfunders participate; if so, how?
* Is a financial commitment required? Will there be a minimum commitment? Should larger institutions commit more; for example, will we use a “sliding scale”?
* Will members be expected or required to participate in meetings and events, review grant proposals, serve on committees? How much time do we expect these responsibilities to demand?
* How will we identify and incorporate new members, and how often will we do it?
* How will we build and maintain trust and good relationships among members, including new ones?

GOVERNANCE

* Do we want to rely on a chairperson or steering committee to handle some responsibilities? What will those responsibilities be? How will they be selected?
* Will the full membership make grantmaking and resource decisions? Will others (staff, steering committee, advisors, grantees) be involved; if so, how?
* How will we make decisions? Will each funding institution or member have one vote? Or will voting privileges be proportional to the amount of members’ financial commitments?
* What if we reach an impasse and can’t decide? How will we move forward?

GRANTS AND RESOURCES

* Will we use an RFP process or open application? Or will we invite applications or otherwise narrow the pool of potential grantees? Will we use a common application?
* How many grants or PRIs will we make per year? Of what amount, and on what grant cycle?
* If we intend to do regranting, will smaller or local institutions be required to “match” commitments in some way?
* Will we provide financial resources only, or will we offer other supports, such as technical assistance, net- working opportunities, or advocacy?
* Will the collaborative itself undertake strategic communications activities such as research, dissemination, policy advocacy, or networking?

EVALUATION

* How will we evaluate the effort? What measures can we agree on?
* Will nonfunders play a role?

TERMINATION

* What is our exit strategy?
* How will we know we’re ready to end the collaborative or move it to a new home?