

*This document is not intended as legal, accounting, or other professional advice; and Maine Coast Heritage Trust cannot attest to the legal, financial, or tax consequences of its use. As each land trust's organizational and project goals are unique, Maine Coast Heritage Trust recommends that all land trusts engage experienced professionals to assist them in evaluating and understanding how to use the information provided here.*

## **Memorandum of Understanding for Usage of Shared Mt. Agamenticus to the Sea Prospect Information**

Source: [Mount A to the Sea Coalition](#)

- I. This Memorandum of Understanding (MOU) is intended to govern the sharing of prospect and donor information for the Mt. Agamenticus to the Sea (MTA2C) Conservation Initiative and its associated fundraising campaign. The target audience is primarily the staff and volunteers of the MTA2C Conservation Initiative and Campaign, the Great Works Regional Land Trust, the Kittery Land Trust, and the York Land Trust. However, the spirit and intent of this MOU should be applied to any MTA2C partner organization interested in accessing or using MTA2C prospect and/or donor information. This MOU is intended for use during the MTA2C Campaign period of November 2003-December 2006.
- II. In the spirit of cooperation, partner organizations will openly share background and information regarding organization and/or community members who are capable of and/or interested in making a gift to the MTA2C Campaign. This information includes but is not limited to: knowledge of a prospect's philanthropic giving history, and capacity; interests; suitable contacts to help engage prospects in the Campaign; relevant information regarding a prospect's community interests, connections, and history, and a prospect's interest and history regarding conservation efforts.
- III. For the duration of the MTA2C fundraising campaign, the MTA2C Campaign Director and Assistant are authorized to gather and manage all donor and/or prospect information relevant to MTA2C fundraising. This includes but is not limited to: hard copy files of donor correspondences or background information, data files shared by partner organizations, and an electronic database for managing all MTA2C donors and activities.
- IV. At the close of the MTA2C fundraising campaign, no single organization shall have unrestricted use of the pooled MTA2C donor and/or prospect information. Instead, donor and prospect information shall be released to the geographically appropriate land trust at the close of the campaign by the MTA2C campaign staff. In other words, the Great Works Regional Land Trust, the Kittery Land Trust, and the York Land Trust, will receive donor and prospect information only for individuals living within their service area.

- V. Information on donors and/or prospects who (a) are not members of the Great Works Regional Land Trust, the Kittery Land Trust, or the York Land Trust, and/or (b) live outside of the six MTA2C towns, shall be available for use by all three of the land trusts after the campaign. However, cultivation and solicitation of these donors and prospects should be coordinated among the three land trusts when the land trusts share a prospect or donor in common, such as when the individual lives or has a seasonal residence in another land trust's service area. Foundation solicitations shall be coordinated among the three land trusts during the MTA2C campaign.
- VI. Information to be released may include but is not limited to: photocopies of hard copy file materials and electronic exports of relevant data base materials, including gift history and anecdotal information. While the MTA2C campaign staff will do everything possible to deliver this information by the close of the campaign, it may be that each land trust will need to elect an individual to assist in obtaining MTA2C prospect and donor data in cooperation with the York Land Trust's staff and volunteers.
- VII. In anticipation of additional, regional, conservation projects, the MTA2C donor and prospect information and/or database shall not be dismantled. However, its use will be firmly restricted to only those projects that boards of the Great Works Regional Land Trust, the Kittery Land Trust, and the York Land Trust collectively approve.
- VIII. By majority vote, the governing boards of the Great Works Regional Land Trust, the Kittery Land Trust, and the York Land Trust may collectively elect to dismantle and disburse the database used for MTA2C and its subsequent fundraising projects. All three boards must vote in favor of this action for it to move forward.