

SELECTING A CONSULTANT

If the decision is to establish a formal or informal coordinated, cooperative, or collaborative relationship, no consultant may be needed. However, one of the most important elements for nonprofit organizations involved in creating strategic alliances or trying to merge is to engage a consultant who can facilitate the process and offer guidance, expertise and a neutral viewpoint.

Since strategic partnerships can be complex, it is useful to retain a consultant with specialized expertise in the area of nonprofit mergers or strategic alliances. Experienced consultants can provide leadership, dependability, and be a resource in working through the awkward issues. The consultant will play many roles during the process, with facilitator and mediator being essential in furthering negotiations. Additionally, the consultant will need to be a highly-skilled communicator and listener, as well as being adept in moving the overall process forward.

During the merger process, there may be a reason to retain specialized consultants, beyond a facilitator, depending on the level of intensity and needs of the organizations involved. The areas that may require outside expertise include: legal services, financial management, human resources, technology, or marketing. Additionally, as the organizations move through the integration process, there may be a need to engage consultants who can provide individual coaching, preparing the Board and staff for changes in culture, roles, and leadership.

Tips on Engaging a Consultant

- Identify the role and key services needed.
- Develop criteria and time line for selecting a consultant.
- Send request for qualifications or ask for recommendations from colleagues.
- Coordinate interview process to include representatives from all partners.
- Include Board Directors and executives in the interview process.
- Agree on a formal contract including scope, deliverables, timeline, and expected fees.
- Ensure that the consultant, who is engaged, has the experience and resources to understand the complexity of the process.
- Detail the expectations for written products throughout the process, as well as upon completion.
- The consultant must also:
 - Develop trust and mutual respect for the organization, staff, and Board Directors.
 - Provide objectivity to mediate difficult discussions and unbiased feedback for the outcome of the process.
 - Prepare for each session.
 - Maintain confidentiality.
 - Encourage positive reinforcement of successful activities.