
Hiring a collaboration consultant: a guide for nonprofits

Developed by the Sustained Collaboration Network and the Consultants Community of Practice

This guide is designed to support nonprofit leaders in finding and vetting consultants and allied providers to explore and implement integrations, shared programs & services, and alliances & networks.

WHAT IS A LEAD FACILITATOR for Sustained Collaboration?

A sustained collaboration consultant or facilitator is a specialized nonprofit advisor who guides organizations through the full arc, from forming to maintaining a sustained collaboration. Think of them as a general contractor for your merger, partnership, or alliance: they coordinate all the moving parts, identify and bring in additional subject matter expertise, mediate mutually beneficial agreements, and help you make sound decisions at every stage.

If you are applying for funding with an SCN member fund, we strongly encourage meeting with a consultant prior to submitting your application so you have a realistic understanding of the costs and steps involved. Visit www.sustainedcollab.org to see a list of current SCN member funds.

Key qualifications to look for:

- ☐ Experience with collaborations at similar scale and complexity to your organization
- ☐ Skilled in facilitation and conflict mediation
- ☐ Deep understanding of nonprofit governance and decision-making
- ☐ Nonprofit (not corporate) financial expertise
- ☐ Familiarity with legal and regulatory issues in the nonprofit sector
- ☐ Change management and integration experience
- ☐ Strong project management skills
- ☐ Cultural competency relevant to your community
- ☐ Experience across multiple collaboration models (not all collaborations are mergers)
- ☐ Demonstrated ethical and professional standards
- ☐ Ability to adapt if your goals or structure change mid-process

Questions to ask when vetting:

- Can you share examples and references for a collaboration like ours that you personally facilitated?
- What process do you recommend given our goals—and is there flexibility?
- What happens with our contract if we decide not to proceed with the collaboration?
- Do you offer end-to-end support or specialize in specific phases?
- What other experts (legal, financial, HR) do you recommend—and can you help us find them?
- Have you worked with organizations similar to ours in mission, size, and complexity?
- How do you manage power imbalances and communication between parties?

Always obtain a detailed scope of work, a clear fee structure, and check references. If needed, an RFP can help clarify your goals and get proposals that match your needs.

STEPS IN FORMING a Sustained Collaboration

Each project is unique and your process may look slightly different but in general, there are three key steps:

1. Assess Internal Readiness: clarify goals, identify partners
2. Exploration & Planning: negotiate, conduct due diligence, reach an agreement
3. Implementation: formalize an agreement, begin integration

By breaking your project into phases, you create planful opportunities to make decisions or change direction.

Where to find consultants:

Leverage your network

Reach out to nonprofit leaders who have recently merged or partnered; board members' professional contacts; nonprofit- experienced legal counsel you may already work with

SCN consultant lists

The Sustained Collaboration Network maintains a national directory of consultants and allied providers, and some SCN member funds keep a roster of local, vetted consultants

Professional associations

You can search databases of consultants by location or specialty through professional organizations like the Association of Consultants to Nonprofits, Consultants for Good, or the regional equivalents

Nonprofit-serving organizations

Local and regional nonprofit resource centers, hubs, or consultancies are often well-networked and may be able to provide referrals or contacts that could lead you in the right direction.

Specialized providers:

A skilled facilitator can handle many aspects of your collaboration but you may also need specialists such as:

- ☐ Legal counsel (with nonprofit experience)
- ☐ Nonprofit financial consultant
- ☐ HR consultant (benefits, compensation, handbooks)
- ☐ PR / communications support
- ☐ Fundraising counsel
- ☐ IT / systems integration specialist
- ☐ Data and evaluation support
- ☐ Dedicated project manager

Remember: As you learn, the structure of your collaboration may change. A good consultant adapts—they should be able to help you pivot if the original vision no longer fits your needs.



Things to avoid:

- Hiring a board member as your facilitator or someone affiliated with one organization and not the other
- Setting aside inadequate time and resources to do this process well
- Assuming a corporate M&A expert understands nonprofit collaboration
- Skipping reference checks or a written scope of work
- Leaving communications and fundraising planning to the end