

TOOL #5: GETTING THE HELP YOU NEED

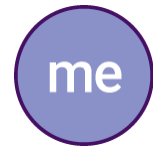
Mergers can be complicated. To guide your organization through the process, consultants who specialize in nonprofit mergers can be engaged at various steps along the way—from the strategic planning process to the integration of two or more organizations into one.

Types of consultants commonly used in nonprofit mergers include the following: facilitator, attorney, accountant, insurance broker, and specialists in fundraising, marketing/communications, human resource management, IT, and database integration, though only the largest mergers would engage all of these specialists on a single merger.

You will need to negotiate a scope of work with your consultant of choice; however, below is a description of the general role and value added for each type of consultant:

- Facilitator
- Attorney
- Accountant
- Insurance Broker
- Specialists
 - Fundraising
 - Marketing /Communications
 - Human Resource Management
 - IT
 - Database Integration

For nonprofits in Illinois, we recommend that you reach out to Forefront’s Mission Sustainability Initiative when launching a merger strategy for the first time. The MSI program can provide you with information on the types of consultants that may be valuable to you, both on a pro bono and fee-for-service.



Forefront
Mission Sustainability Initiative
Genita C. Robinson, Director
208 S. LaSalle, Suite 1540
Chicago, Illinois 60604
(312) 578-0090
msi_director@myforefront.org
<https://myforefront.org/forefront-mission-sustainability-initiative>

Provides pro bono technical assistance resources for nonprofit organizations seeking to engage in strategic partnerships, including mergers, acquisitions, back office collaborations, joint ventures, and other long-term or permanent programmatic alliances

