



## The PANO Consultant Collaborative Memorandum of Understanding (MOU)

### Who is PANO?

PANO (the Pennsylvania Association of Nonprofit Organizations) is a statewide membership organization supporting the thousands of nonprofits that serve millions of people in the Commonwealth. PANO brings nonprofits together from across the state and equips organizations with the tools needed to achieve their missions.

### Our Mission

PANO amplifies the voice, value, and impact of community benefit work to transform lives.

### Our Vision

PANO envisions an equitable, inclusive community where all individuals are able to reach their fullest potential.

### Our Values

- **Accountability:** We hold ourselves, and ask others to hold us, responsible for living by and in our values.
- **Bridge Building:** We bring groups and people together to create innovative solutions.
- **Justice:** We mindfully embed justice-based practices into all policies and programming.
- **Respect:** We model appropriate boundaries and listen with empathy to understand the boundaries set by others.
- **Risk Taking:** We are curious and explore new strategies for achieving systemic change.

### What is PANO's Consultant Collaborative?

PANO's Consultant Collaborative (CC) is a community of practice among experienced, innovative professional consultants. The CC meets regularly to share collective wisdom and establish connections with one another to facilitate further collaboration. Members of the CC have the opportunity to work with nonprofit organizations requesting consulting support through PANO. Organizations seek support in areas such as board retreat facilitation, strategic planning, merger assistance, human resources, and fundraising.

### Shared Mission, Vision, and Values for the Consultant Collaborative

The goals of the CC are to support one another, learn with and from each other, and together advance solutions that support strong, healthy nonprofits – nonprofits that, in turn, support strong, healthy communities. By walking alongside each other and those we serve on projects received through the CC, we commit to furthering PANO's mission, vision, and values.

### Expectations of the Consultant Collaborative:

Consultant Collaborative Members will abide by the following actions regarding the following:

#### 1. Consultant Collaborative Membership

- a) Commit to furthering PANO's mission, vision, and values.

- b) Maintain and provide annual proof of professional and general liability insurance.
- c) Network with intention, including attending monthly CC meetings as often as possible (the intention of “getting to action that facilitates community change”).
- d) Work in a way that is interconnected wherever possible to accomplish the goals of clients and to share knowledge, experience, tools, and strategies as needed to create more organizational impact.
- e) Maintain professionalism as advisors, colleagues, referral sources, and a community of practice.
- f) Annually: Complete a survey, update professional information (including professional and general liability insurance), provide a signed W9 form, and sign an MOU.

## 2. Consultant Collaborative Projects:

- a) Represent and stand-in for PANO on projects receive through the CC.
- b) Walk alongside of clients rather than making “the hard sell”; meet clients where they are.
- c) Participate in the intake and proposal process as needed.
- d) Collaborate with other members of the CC whenever possible.
- e) Maintain confidentiality of any information deemed as confidential by PANO and/or any of its constituents; Consultant Collaborative members shall not disclose that information to any outside party during or after the engagement with PANO and/or any of its constituents – unless required by law or if the information becomes public by no fault of either party.
- f) If Lead Consultant, present a work plan to PANO once contract is awarded.
- g) Sign a letter of Agreement with PANO.
- h) Share final work product with PANO.

PANO will abide by the agreed-upon protocols to oversee and facilitate the Consultant Collaborative regarding the following:

### 1. Consultant Collaborative Membership

- a) Vet potential members through an application and interview process that involves PANO staff and current CC members.
- b) Either deny or onboard the applicant.
- c) Encourage attendance at monthly meetings.
- d) Sign the MOU.

### 2. Consultant Collaborative Projects:

- a) Receive project requests via PANO administrative tools.
- b) Assure equitable and appropriate sharing of potential work.
- c) Assign projects based upon interests, skills, and fit.
- d) Work with the lead consultant to finalize the proposal and contract.
- e) Approve the contract and work plan for each project, any changes to these initial plans, and the issuance of periodic consulting invoices and work reports.
- f) Create and sign a letter of agreement between PANO and the consultant(s) engaged.

- g) Monitor the progress of each project via the lead consultant and support the accomplishment of the clients' organizational and community objectives.
- h) Bill the client and pay consultants for their work.

**Both Parties will:**

- a) Fulfill all agreements in a timely manner, including payment, scheduling, and deliverables.
- b) Address concerns directly, promptly and from a solution-finding perspective.
- c) Honor PANO's Consultant Collaborative Monetary Commitment for projects awarded through the CC:
  - o Consultants determine their fees and build in a 15 % administrative fee to be collected by PANO for managing the proposal, contracting, and invoicing processes
  - o A 2% discovery fee will be collected by whomever brings the project to the group (e.g., if the project comes in through PANO channels, PANO will collect this fee; if a consultant shares an opportunity that ends up being run through the CC, that consultant will collect this fee)
  - o Consultants will determine how to share revenue with each other on multi-consultant projects; a 5% project leadership fee is suggested for any consultant taking the lead on a multi-consultant project (note: PANO could be eligible for this additional 5% fee if PANO plays that leadership role on a multi-consultant project)

**SIGNATURE**

*I understand being a member of this PANO Collaborative Consultant Group is a privilege to help make our collective communities better places to live, work and thrive. I further acknowledge that by signing below, I am binding myself to these expectations and values.*

**Consultant**

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*Printed Name, Title, & Consulting Firm (if applicable)*

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*Signature*

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*Date*

**PANO**

Stephanie Chapuis, Consultant Collaborative Manager, PANO




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*Signature*

\_\_\_\_ *January 1, 2024* \_\_\_\_  
*Date*