



Marta Brockmeyer, Ph.D. Project Pointers

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POISED FOR PARTNERSHIP



Few periods have found me pulled in so many directions at once. People often ask what it's like to have a home office. Generally, it works beautifully for the type of work I do and my personality. But when a home office winds up in the middle of major house renovations, things get a little crazy. Add to this multiple technology problems during the last month (not to mention trying to keep a dog quiet during renovations) and I have been a tad distracted. And, I've been working on a couple of merger explorations, an opioid-focused initiative and several other nonprofit projects. Thanks to everyone for your understanding and patience!

Of course, many positive things also occurred during recent months. One of the most rewarding was my opportunity to observe a nearly textbook perfect merger exploration. I have been thinking a lot about how the participants set such a good example for our community and offer a few thoughts below.

TURNING POINT



A Winning Steering Committee

I have worked on forty-five partnership projects, all interesting and no two alike. Of course, some common themes usually emerge during due diligence or integration and many are predictable. But, the partners' response to challenges is what determines the difference between success or disappointment. Five factors greatly increase the probability that a merger steering committee, composed of board representatives from each organization, will enjoy a good outcome.

1. Board development. Boards can never anticipate all that may arise during a year, but they can develop the confidence to respond thoroughly. An effective board is committed to the development of its members, preparing them to make informed, strategic decisions. Of course, one of the group's essential responsibilities relates to partnerships. The board should establish partnership selection criteria. Then, each member can keep them in mind while talking to others in the community. Board development results in a state of readiness, with a nonprofit open to possibilities.

2. Steering committee composition. If a board votes to pursue a formal partnership, it must then decide which board members are best suited for this particular endeavor. It is always helpful to seek a balance in terms of board member longevity, skills and styles. Civility and flexibility should also be considered, because these usually have more impact on the process than professional backgrounds. Steering committee members must also have enough available time to schedule meetings in advance and deal with the unexpected time drains.

3. Strategic focus on mission. Good committee members can emotionally detach and distinguish between the advancement of their organization's mission and the organization itself. Typically, the mission can be promoted and fulfilled through several corporate structures, but it can be difficult to think beyond what exists. If conflicts arise, egos must be pushed aside so everyone can again focus on the mission and greater good, free of sentimentality.

4. Business acumen. The details matter, as does the commitment to review and absorb them. While content specialists may be required during certain stages of due diligence, the steering committee should consist of people who can conduct an informed review of finances, fund development, HR, programs and technology. In concert with key senior staff members, the committee must understand the details well enough to make its recommendations to the boards. Business acumen is especially important for predicting the sustainability of a combined organization.

5. Presence and passion. Effective steering committee members are sensitive, diplomatic and thoughtful. They listen to others in an active, nonjudgmental manner to balance the needs of both organizations. By paying attention to the process and each other, these busy representatives manage conflict and remain patient. They are truly present, at many levels, and bond in forward-moving rhythms that sustain their missions and expand services for the community.

Of course, steering committee members bring other positive qualities and experiences to their work. But the board representatives that lack the above five characteristics usually experience too many roadblocks to move through a successful merger exploration. Choose them wisely.

TALKING POINTS



"Thanks so much for being the steady, experienced, third party who we benefited from so much during our journey toward merger ... thanks for the important work you do for our community."

-- Board Chair and Steering Committee member

"You were our secret sauce! You have been wonderful to work with, and so deft at keeping us on track while dealing with sensitive issues. We can't thank you enough."

-- Board Chair and Steering Committee member

"Thanks again, Marta, for all your skillful leadership in this effort. You are clearly a master merger manager."

-- Steering Committee member



Several times lately, I have been reminded of the importance of having experience **in** our community. I work with and refer an exceptional group of independent consultants who have a deep understanding of our region, the kind of seasoned, detailed knowledge that only comes from local experience.

This edition of the newsletter highlights two service categories:

Human Resources

Recently, the list of HR-related offerings has grown to include the HR Hotline! The HR Hotline is designed for the employer who has questions related to employees, employment issues, or other workplace concerns. It is helpful for nonprofits that do not have a dedicated HR staff member, and it serves as a "second opinion" resource for those that do have dedicated in-house expertise.

And as a reminder, other HR partner services include:

- Senior skills; SHRM-SCP and SPHR certified
- Project, retainer, and interim services
- Launch of select or comprehensive HR functions
- Compliance and best practice audits
- Policy development and handbooks
- Recruitment, selection, retention, and employee development
- Job descriptions
- Workforce realignment and succession plans
- Individual and team coaching
- Outplacement services

Fund Development/Philanthropy

- Board development knowledge and deep understanding of nonprofit revenue stream issues
- Strategic alignment of services, positioning for the long view
- Fund development plans with strategies and tactics to secure community support, including foundations (community, corporate, and family)
- Local grant writers who know the funding landscape very well and will help nonprofits create a pathway for financial support from foundations
- Federal grant prospect research, grant writing, reporting and project management
- Stewardship assessments, including communication strategies and materials
- Sustainability audits

Please let me know if you would like to learn more about any of my partners or if you are seeking another type of specialized assistance. For a full listing of partner services, please [click here](#).

WORKSHOP REMINDER



Marta's popular Project Management Basics workshop will be offered in September, 2018. This workshop receives consistently high marks from participants.

Project Management Basics

Tuesday, September 18, 2018

9:00 a.m. - 12:00 p.m. at Interact for Health

3805 Edwards Road, Suite 500

Cincinnati, OH 45209

[Course Outline](#)

WORKSHOP REGISTRATION

Workshops on Site

For convenience and increased participation, you may prefer an in-house workshop. When a larger number of employees share concepts, language and tools, projects move along more smoothly. In some cases, a series of customized follow-up activities complement the foundational workshop. Evaluations from recent on-site trainings have been enthusiastic. Please contact Marta for more information about in-house, customized training.

TOUCH POINT: CLIENT SPOTLIGHT



Mill Creek Alliance

March 2, 2018 was an exciting day for conservation in Cincinnati. On that day, the Mill Creek Watershed Council and Groundwork Cincinnati Mill Creek merged to form the Mill Creek Alliance.

The restoration and revival of the Mill Creek is an environmental success story in the making. Driven by collaborations with the 37 communities touched by the stream as well as the work of dozens of companies and hundreds of volunteers, the two founding organizations have achieved steady and profound improvement in the Mill Creek. The water quality has improved dramatically, and long-missing species have returned to its ecosystem.

The Mill Creek Alliance will expand upon all aspects of conservation and restoration. It will continue cleaning up and restoring the banks of the stream, remove impediments, reconfigure the stream bed, and abate flooding from storm water runoff.

The nonprofit's school programs provide education and offer hands-on conservation opportunities for over 1,000 students per year. The Green Team gives urban teenagers paid summer jobs and a chance to study and experience this natural environment. The

Green Corps offers expanded green workforce training for young adults. It also continues to expand biking and hiking trails and make it safe to fish or paddle on the stream.

The last 25 years have seen the Mill Creek change from an eyesore to a reviving amenity to our community.

End Point

I hope you found the tips and pointers in the edition helpful. But we all know that partnerships can be complex and the nuances can't be summed up in a brief article. I'm always available for a phone consultation, and now that my renovation is complete, I again have a quiet office! I'm happy to talk with you about your specific situation.

Wishing everyone a lovely spring.



Best wishes,

Marta

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