



Marta Brockmeyer, Ph.D. Project Pointers

Issue 51

Summer 2018

[Website](#) [Clients](#) [Projects](#) [Bio & Values](#) [Testimonials](#) [Partners](#) [Training](#) [Contact](#)

POISED FOR PARTNERSHIP



Thanks to generous funding from Interact for Health, I have been given the special opportunity to work with the Hamilton County Heroin Coalition. My projects are usually rewarding, but this one is especially fulfilling as I see firsthand the remarkable mix of intelligent, strategic and compassionate leaders who are addressing the opioid crisis. I have hope.

When I think about these dedicated people, I am reminded of what it takes to create good partnerships. I am constantly amazed by the energy and resilience of my good nonprofit colleagues. You are pulled in hundreds of directions each week and still manage to provide sound leadership for your organizations. But so many people have told me recently that they are exhausted from the number of requests for their time. I also experience this challenge and recently developed five simple questions to ask myself before making new commitments. The following may be helpful as you decide whether to say *yes*, *no* or *maybe*.

TURNING POINT



Ask Before You Commit

Most of us would say we entered this field to "help other people." Over time, our definition of *helping* may have changed, based on experience, time limitations and continuing education. Write down what the word help means to you now and note how it may have changed during your career. As with most professional matters, intentional thinking almost always results in better decisions. Ask yourself:

1. Must I respond? Yes, you must. Unless it is something as impersonal as a robo-call or blanket email blast, we should respond when asked. When colleagues ask direct questions or solicit something specific, do communicate with them. It is fine to say that you are not sure or cannot answer right now, but they deserve an acknowledgement. This basic mark of civility separates strong leaders from those who feel they are not required to exhibit good manners. Given how easy it is to respond electronically, there really is no excuse for ignoring colleagues.

2. Am I the best person? You may not always be the right organizational representative even if you are the one who receives the request. There are times when only the nonprofit CEO can or should respond. This may result from a long-time relationship, political issues surrounding a meeting topic, or a decision-making authority requirement. Sometimes, just asking the question frees energy and provides greater flexibility in your response.

If you ask someone else in the organization to meet the request, establish roles and boundaries to avoid confusion. And, try to be clear about your expectations in terms of their reporting back on next steps. As a courtesy, introduce your designee to the requesting party if they do not know each other.

3. Are there alternate ways to help? If you are unable to meet the person's specific request, a different or limited type of participation may be possible. The person who contacted you may be too distracted to even think of other paths and will appreciate your suggesting a few alternatives. This not only allows you to feel good about responding, but the other person will remember that you volunteered, not that you quickly declined to participate.

4. Do we both understand the commitment? So many conflicts arise because people cannot clearly articulate what they want or will do. And, we often hear what we want to hear. It is human nature to rush through some conversations, but so much stress results from these misunderstandings.

Additional phone calls or emails may be necessary to fully understand what the person wants. Any clarifying questions you can ask will pay off for both of you. During this process, the person may refine what she or he wants. But even if the scope does not change, try to break it down into parts before making a commitment. In the process, you may actually lead the person to reduce overall tasks or rethink the original goal.

5. Is it OK to say no? If the request does not align with your new definition of *helping* and you feel secure in your reasoning, declining is the obvious answer. Exceptions might be made to avoid a political firestorm or hurt feelings. The more important issue is how you communicate the decision. If the relationship is solid, you can share some of your thoughts and hope the person accepts the explanation. If you don't know the person well, a brief, polite comment and a thank you may be best. And, if you feel lighter after you deliver the message, you know you have made an important step toward managing your time.

During the last month, three requests led me to walk through these questions. In all three cases, I was able to make better decisions and respond in a way that was respectful but clear. I accepted one and declined one. For the third, I agreed to make the commitment if the start date could be pushed out three weeks. My colleague was happy to receive a yes, and I was in a better position to truly help. I now keep these questions over my phone to remind me to take time to thoroughly review requests.

VIEWPOINT: IN MY EXPERIENCE



Consulting means being "on call" for an array of interesting questions. A few recent ones may resonate:

Q. We received a vague inquiry about a possible partnership - now what?

A. If the possibility was presented to you in a casual or offhand manner, meet with the other leader to learn what she or he had in mind, then discuss possibilities. Of course, you would not need to establish a formal committee to explore the options at this point. After you and your potential partner talk, the typical next step would be a meeting between the two of you and your board chairs. If this experience is positive, a discussion with your executive committee and full boards might follow. This is the ideal time to confer with a consultant to learn about time-saving processes and ways to avoid landmines.

Q. Should we change our name if we merge?

A. Maybe. As with most merger-related issues, the situations vary. First, if one of the nonprofits is affiliated with a national organization, a name change may not be possible. It is best to communicate with the headquarters staff about guidelines and limitations before making a suggestion to your partner. If you are not officially operating under a national brand umbrella, there are many advantages to a name change.

A name change puts everyone on equal footing. Retaining one nonprofit name and eliminating the other can lead to resentment and feelings of great loss among staff and stakeholders. The decision to merge may feel more like a takeover than a combination of equals. A name change also offers a splendid marketing opportunity and reinforces the value of the merger. If the boards agree on a name change, the branding campaign should begin as soon as they vote to combine.

In a situation where one of the partners has recently launched a well-received name change, it would be confusing and expensive to quickly change names again. If the decision is made to merge and use the recent name, the organization that is losing its name will require extra attention and sensitivity.

Q. We're trying to standardize our voicemail greetings. Any suggestions?

A. The phone that serves as the main nonprofit contact point might briefly reference your mission statement, but it should be as short as possible to save the listener time. A caller probably knows what your organization does before trying to connect in the first place. There is a fine line between promoting a brand and forcing a busy person to spend extra unnecessary time on the phone while conducting business.

Individual outbound greetings should not include an elevator speech. Your name and concise request to leave a message are usually all you need to let the caller know you will respond. Such brevity communicates your respect for the other's time. While working on one project, I needed to call a client eight times in one day - I still remember how maddening it was to be held captive by the long outbound greeting. Keep it short.

More Questions? Just ask and I'll include them (anonymously) in an upcoming newsletter.

TALKING POINTS



"I want to thank you for all of your help in our merger exploration - your expertise, support, availability, encouragement mean so much."

-- Executive Director

"Good work, Marta! You led us through an experience of learning, bonding and trust."
-- Steering Committee member

"I cannot thank you enough - we literally could not have done this without you."
-- CEO, merger exploration partner

PARTNER SERVICES SPOTLIGHT



I work with and refer an exceptional group of local independent consultants who have a deep understanding of our region and provide a wide range of skills. The services in one specialized content area follow:

Communications, Marketing and Public Relations

- On-target, results-driven marketing research, strategies and communications
- Promotion of strategic plan through implementation of marketing goals and tactics
- Brand audits and development
- Customer experience audit
- Promotion of strategic plan through implementation of marketing goals and tactics
- Writing, editing of media relations, newsletters, websites, and overall communications management
- Implementation of communication tactics; creation of a virtual team specific to each nonprofit
- Organizational messaging/positioning, communications development
- Training and coaching in-house marketing team
- Deployment of a wealth of creative resources, including photographers, graphic designers, videographers, website developers and more

Please let me know if you would like to learn more about these consultants or need a different type of resource. 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.

"Thanks again for your outstanding project management class. People are using your techniques and the methods are working." -- Executive Director, Behavior Health Organization

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



Hamilton County Heroin Coalition

Beginning in 2012, heroin-involved overdose deaths began to skyrocket in Hamilton County. The **Hamilton County Heroin Coalition** was created in 2015 in response to these surging numbers. Since its inception, the HCHC has attempted to break down silos and encourage collaboration among law enforcement, EMS, public health officials, federal, state and local government entities, hospital systems, religious organizations, and treatment providers to help fight the rising rates of opioid-related overdoses and deaths in our community.

The four "pillars" of the Coalition (prevention, treatment, harm reduction, and interdiction) help guide the wide array of programs that the HCHC has to offer. Some of these programs are:

- County-wide Quick Response Teams that visit overdose victims and try to get them into treatment,
- 7-day access to treatment,
- a 16-bed Engagement Center - a triage facility meant to create a smooth transition between detox and treatment,
- The Exchange Project, the Heroin Task Force that investigate overdose deaths back to the source dealer,
- educational programs in schools,
- and various community outreach initiatives.

The Hamilton County Heroin Coalition is always looking for community involvement. For more information on its partners, or what it does, visit our [website](#) or email the Heroin Coalition Coordinator, [Emily Manning](#).

End Point

There are times we all must say yes. But in the words of Paulo Coelho, "When you say 'yes' to others, make sure you are not saying 'no' to yourself."

Practice saying no when you can, so you can say yes to the things that matter!

Enjoy all that summer brings.



Best wishes,

Marta



**SHARE THIS
EMAIL**

[VISIT MARTA'S WEBSITE](#)



**SIGN UP FOR
OUR EMAILS**
