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POISED FOR PARTNERSHIP



What a year! Both professionally and personally, 2018 delivered quite a collection of events. While keeping up with everything has been a challenge, I enjoyed some of the most rewarding projects of my consulting career, made improvements on an older house that needed attention, and tracked important issues during a critical election.

Because of the year's pace and wide range of issues, I reached out to my friends, colleagues and professional partners even more than usual. Some days, it was a quick telephone chat with a client who was working on an important community initiative or a friend who made me laugh. Other days I needed to confer with another consultant about project implementation stumbling blocks. Put simply, my partnerships sustained me.

My hope is that yours sustain you. Our current issues are complex and challenge the delivery of quality services. One organization cannot address them alone, nor can one leader. This edition of Project Pointers revisits the power of partnerships.

TURNING POINT



Time to Rethink Mergers and Partnership Options?

Most of you already participate in various partnerships that promote learning and address client needs. These relationships may have prompted thoughts about additional partnership options that have not yet been explored. Perhaps another CEO approached you about a merger, but it was not a good organizational fit. Or, the timing for another was wrong because of board composition, senior leadership turnover or a pending accreditation site visit. You may have discussed shared services with another leader, but it felt too complicated to pursue. No matter what your previous experiences were, it is time to again consider the value of formally joining forces with another nonprofit. The current environment suggests no less.

A solid partnership can create many advantages for consumers and their families, the organization, and the community. Reminders of the primary benefits follow:

Client Services. Even if your organization enjoys a sterling reputation and consistently produces good outcomes, you may not be able to meet all of your clients' needs. Or, you may not be able to serve the number of people who need your services. A formal partnership with another nonprofit can expand the range of services and increase capacity. Programmatic sustainability is more likely when the offerings expand and complement each other. And, new joint efforts are particularly important when trying to reach those who have more than one presenting problem or diagnosis.

Financial Sustainability. Strong organizations that are financially solid still must work to retain that status. A partnership may help increase revenue and lower costs. Usually, a collaborative effort broadens the type of funding for which the two organizations are eligible. In addition, most funders require a nonprofit to submit a list of partners before they will evaluate the worthiness of a grant application.

A reduction in duplicative administrative expenses can make a difference, as well as new, joint fundraising efforts. But a combined investment in advocacy is often one of the largest income producers, even if it does not yield immediate rewards. Of course, in any type of corporate integration, the financial benefits can increase significantly.

Marketing. Well-known nonprofits can struggle with telling their stories and promoting their brands as much as the less-recognized ones. The launch of a formal partnership brings the perfect opportunity to share news, increase public awareness and outline strategic directions. If you have decided to merge with another organization, you have a one-time "big deal" announcement opportunity that is invaluable. Because mergers are now considered standard business tools, there is less concern about sending the message that one of the organizations is in trouble. Rather, news of a merger sends a resounding positive message that you and your partner are committed to clients. These marketing efforts will create even more impact if they are implemented as part of a comprehensive communication plan.

Professional Development. You may have very good volunteers, board members and employees. Still, frustration resulting from limited resources for their continuing education and growth may run high. This situation may be more acute because of the ongoing difficulty in recruiting and retaining human services professionals. Sharing training, evaluation methods and other HR development efforts can expand your staff's capacity. And, the most effective learning usually occurs when people begin working with new colleagues.

In some cases, staff members have advanced as far as possible because alternate positions do not exist in the current organization. A merger usually results in a new organizational structure, with new career paths and potential raises for some employees. These changes can energize staff members and enhance recruitment efforts.

Board members and other volunteers also benefit from formal partnerships. As with the staff, training and evaluation methods for volunteers can be shared. And, one board's practices and procedures may be adopted by the other. Of course, a merger creates a new board that includes members from both previous boards, allowing best practices from each of the former organizations to shine.

Succession. Partnering has special value for an executive director who is engaged in succession planning. A partnership meeting to explore shared marketing efforts provides an opportunity to observe agency staff in a larger context. These conversations may identify candidates who should be developed for future vacancies or new roles. In the event of an impending CEO retirement, a partnership initiative may help identify a new organizational leader.

If you are exploring a merger, the candidate pool for various key positions will probably be larger. A combined entity usually provides a more diverse range of competencies, simplifying succession and filling any current management gaps.

Mission Preservation. Reduced to its simplest, the right partnership can ensure the future of your nonprofit. Whether it is a decision to share back office operations and specialized staff or to combine at the corporate level, your ability to maintain client services may depend on your willingness to work with others while remaining open to change. If board members and key employees feel the organization is adequate as it currently exists, remind them that your mission may be at stake if you continue to operate as you always have.

VIEWPOINT: IN MY EXPERIENCE



HOLIDAY STRESS

'Tis the season - for holiday stress. For nonprofit leaders, add in the increased need to provide for clients, the pressure of year-end reporting, and looming funding cuts to an already full plate. There's no magic potion for hassle-free holidays, but here are a few tips to help you manage the season:

- Choose your battles, and your priorities, wisely. In this field, we're used to doing it all, but here is a gentle reminder that some things really can get done without us.
- Don't let perfection be the enemy of good. Your commitment to quality may be what makes you an outstanding leader, but unrealistic expectations can prevent you from achieving perfectly acceptable results. And, is a pie from a good bakery really that different from one you baked yourself?
- Turn off the news. With the constant feed of information, it's easy to get overwhelmed, depressed or detached. Balance your need to stay informed with a reasonable amount of input time. It is still possible to stay up to date without being bombarded every hour.
- Self-care needs to go beyond a bubble bath and a glass of wine. Build healthy habits that create a way of life rather than an occasional treat.

- Start shopping now for next year! I shop all year round and take advantage of the post-holiday sales. And, I've learned the hard way that if I see an ideal gift item for a loved one, it will be gone next time I check.
- Seasonal depression is real, so if your symptoms feel like more than a passing mood, seek help.

Finally, remember that December is special in many cultures. Find the positive, practice gratitude daily and stay open to the possibilities. They are all around us.

TALKING POINTS



"Thank you again for your excellent consultation. I greatly appreciate your candid remarks. I will take them to heart and put in play action steps that will address the issues identified."

-- CEO, Behavioral Health

"This is a great report and the data you obtained will go a long way to establish goals and objectives... you really do shine with interviews such as these."

-- Senior Nonprofit Consultant

"I went to your Project Management class yesterday and it was fantastic! I learned a great deal and could not wait to get to working with my new tools."

-- Trainer, health-related nonprofit

POINTING TO A GOOD READ



Curling up with a good book when it's cold...heaven! Here are a few I've enjoyed lately:

On Tyranny by Timothy Snyder. This is a short but profound read that infuses optimism into our current civic state.

Less by Andrew Sean Greer. This novel won the Pulitzer Prize and provides a funny and endearing ride. I had to read sentences a second time because they were so packed with rich detail and humor.

The Watergate: Inside American's Most Infamous Address by Joseph Rodata. We know the political history, but this book presents the inside view of the building's design, construction and fascinating occupants.



Mirroring the above discussion about partnerships, the time is perfect to revisit your strategic plan and its implementation documentation. I work closely with several independent consultants who are superb at delivering concrete strategic planning services. And, I often join them to broaden the scope and depth of the planning effort. Please let me know if you would like an introduction to my seasoned colleagues who offer the following:

Strategic Planning and Enterprise Development

- Strategic planning to include goal/strategic direction consensus and the development of quantifiable objectives
- Vision, mission and values development
- Key stakeholder interviews
- Facilitation of staff input to support planning
- Development of key performance indicators
- Development of outcomes and action-based implementation plan (operation level)
- Design and implementation of community input process
- Identification of community-based opportunities
- Market analysis and evaluation
- Survey development
- Social enterprise
- Impact measurement
- Cause storytelling

WORKSHOP REMINDER



Marta's popular Project Management Basics workshop will be offered at Interact for Health in the Spring of 2019 and dates will be announced soon. This workshop receives consistently high marks from participants.

Please watch for updates on Interact for Health's [website](#).

Project Management Basics Course Outline

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.



Children, Inc.

Children, Inc., a United Way Agency Partner, is a nonprofit provider in child care, family support, and school-age services in Greater Cincinnati. Children, Inc. services span prenatal through college and career. Their multi-generational approach to fighting poverty in our community, as well as their work in advocacy, training, and research, builds a strong foundation for success for over 3,000 children and families in our region every year. Children, Inc. has a variety of programming and services to support children and families in our community, including:

- Early learning centers in Cincinnati and Northern Kentucky serving children of all income levels infant-kindergarten.
- Innovation Lab, the organization's research-to-practice division that turns the latest research about child development into practical techniques for children, families and professionals.
- NaviGo College and Career Prep, one-on-one coaching program for students to prepare them for life after high school.
- Leadership Scholars, an eight-week parent academy program that helps parents develop the skills and mindset necessary for a child's college success.

For more information about Children, Inc., visit their website [here](#).

End Point

My hope for the new year is that we can all embrace change and each other's strengths during uncertain times. Enjoy the season and thanks for your ongoing support.



In partnership,

[VISIT MARTA'S WEBSITE](#)