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Project Pointers

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POISED FOR PARTNERSHIP

Requests for stakeholder and staff interviews have increased significantly during the last two years. With my essentially curious (nosy?) nature and years of experience, these knowledge acquisition projects are rewarding. The practical value to the client quickly emerges and they hear what others really do think about the organization. If you are considering interviews as part of your agency's strategic planning process or want to jump-start a programmatic initiative, this edition of Project Pointers may be of interest.

TURNING POINT

What Do People Really Think?

Before deciding if staff or stakeholder interviews would be helpful, consider the following four issues:

Purpose
First think about what you hope to learn, then clearly state your goals. This not only saves resources and reduces possible missteps, it informs the question construction and identifies the right audience. If the main purpose of the interviews is to provide public relations and enhance name recognition, the questions will deal more with reputation and community collaboration. These will probably be asked of key stakeholders instead of staff and volunteers. If the purpose relates to evaluating internal programs, the questions will be less global and will typically involve the staff. In some cases, interviews provide a foundation for future planning by establishing a baseline related to perceptions. This type of data collection is especially important for fund development and marketing.

Clients often launch their strategic planning process with interviews, both internal and external. It is difficult to create a meaningful plan if you don't know what the community needs and how your organization can respond. Interview results will help you identify potential areas of growth and reduction.

Participation
Before compiling stakeholder names, think about who should serve on the planning team. You may need their community relationships and historical view to gather the right names.

Of course, the list of those who will be interviewed depends on the focus of the project. For internal interviews, the selection of names may require an explanation because other staff will wonder why they were not included. In general, pick the people who have the background and credibility with other employees. Selecting participants by job category can be an easy way to group people, and it usually makes sense to others in the organization.

For external interviews, a broader range of perspectives is recommended. In some cases, it helps to include a few people who have had little direct experience with your organization. They may be ideal for sharing comments about reputation and related community needs. Data collection related to high visibility initiatives requires a broad stakeholder interview base. Depending on the current community landscape and the funding trends, these interviewees might represent the business community, providers that offer similar services, local governments, law enforcement agencies, parents, referral sources and state agencies related to your content area. Once you establish your categories, it is important to balance the numbers in each.

Last summer I conducted over fifty stakeholder interviews for one project, but that was unusual. Fifteen interviews are usually adequate for human services organizations, but any fewer than ten will limit the usefulness of the information.

Logistics

First, who will conduct the interview? Discuss the benefits of using a knowledgeable staff member as well as the advantages of seeking an outside interviewer. Again, this depends on the purpose of the interviews. If you want to establish an ongoing conversation with interviewees, it may be helpful if a staff member conducts the interviews and follows up. But if you are primarily seeking broad themes or asking about a more controversial topic, you are far more likely to receive candid opinions if an outsider asks the questions.

Another logistic issue is the type of interview you prefer. If you want to create an environment for an interactive exchange of ideas, then a group interview may be best. Even if participants have the technical capacity to participate from different locations, an in-person event is best. Of course, a group session is often followed by a few individual interviews with select participants.

If individual interviews are indicated, phone interviews are usually most successful. The person can select the most convenient day and feel more control over the length of time they are spending. It also may be easier to focus on the questions without distractions. Highly sensitive topics may require in-person interviews. They are harder to schedule, but may yield richer comments.

Communications

As with most efforts, communication is critical in engaging participants. The purpose of the interviews will, of course, guide the development of your messages. For an internal audience, an introduction to your mission is probably unnecessary, but a reminder of the array of services may be. The initial invitation should come from the executive director and clearly state the focus of the interview, its time and place and who is facilitating. Soon thereafter, the scheduled interviews and purpose should be shared with appropriate staff to help reduce rumors and resentment.

Stakeholder interviews offer a great public relations boost. Most participants express admiration for such intentional planning and are honored to help. The invitation should state that the recipient is one of a limited number of people who have been chosen to help. It is also very important that those who share their valuable time receive an official thank you from the CEO. And, in time, it is always best to share a brief summary of the project outcomes.

After you and your team make the above decisions, you should be on track to learn what people think about your work. Even if you are not surprised by the interview results, you will have solid planning data for moving forward.

VIEWPOINT: IN MY EXPERIENCE

Interesting questions come my way! Here are a few recent ones:

How much is too much process?
Believe me, you'll know. At some point in most projects, a participant will raise this question. And it provides a welcome moment to step back and evaluate what the team is doing. If the process is so cumbersome that you are spending more time documenting the process than doing the actual work, it's too much. And a prescribed process may actually interfere with what you set out to do. In general, the initial plans rest on a foundation of solid process and next steps. Then over time, a cohesive group usually moves forward enough to eliminate or shorten steps. Then process-heavy discussions typically return when it's time to create an implementation plan.

I noticed your list of clients, but why don't you include the actual work you did for each?
Most but not all clients are listed on my website. Often the list provides reassurance to a potential client, especially if a partnership exploration is under consideration. It is not unusual for someone to say, "Oh good - you've already worked with the organization." The list of client names also reflects familiarity with certain content areas.

To preserve each organization's privacy, I am unable to align the actual projects with client names. While honoring this confidentiality is critical for partnership work, I promote this value with other colleagues as well. Also, in some cases, I have worked with an organization for many years, facilitating multiple projects which would mean a long list. Once a project becomes public and I am asked, I will usually say I helped support the process but not share details.

What do you think about having co-CEOs?
Please refrain from adopting this model! The decision to create co-leaders often results from good intentions, such as a desire to model collaboration or honor a founder. Unfortunately, the decision produces a state of confusion about who has the ultimate authority for decision making and is especially disruptive for staff. It also may frustrate relationships with other CEOs and challenge financial development efforts. Every effective leader needs a team of outstanding direct reports, but only one person should have the ultimate responsibility for decisions and accountability.

Additional questions? Please send them along and I'll give you a call or respond in the next newsletter.

TALKING POINTS

"This is an exceptionally helpful report that will allow me to think further about our strategic planning project."

-- CEO, Behavioral Health

"They are in good hands with you - they chose the right consultant."

-- Executive Director, county funder

"Marta, I read your article on partnerships and was enlightened. Very well thought out - thanks for sharing your insight."

-- CEO, Addictions treatment provider

POINTING TO A GOOD READ

Get the Grant by Ashley Cain and Bruce Ripley is an excellent book. These local authors have crafted a simple, succinct book that is both informative and accessible. This is a good investment (about $10) to enhance your fund development efforts.

And I recommend the following recent reads:

Broadway: A History of New York City in Thirteen Miles. Fran Leadon's richly detailed book moves the reader northward through Manhattan, one mile and one decade at a time. The social history is fascinating and great fun.

The Summer of '49 by David Halberstam. This older book captures the country's obsession with baseball following World War II. While it focuses on the bitter rivalry between the Yankees and Red Sox, the history and insider stories would appeal to any baseball fan.

Be Fearless by Jean Case. This inspiring book highlights the lives of people who promoted change, learned from mistakes and improved our cultural landscape.

PARTNER SERVICES SPOTLIGHT

Operations is a vital component of nonprofit organizations, regardless of size and operating budget. The person who assumes this important role is responsible for directing agency activities and the allocation of resources for best mission delivery. Depending on the size of a nonprofit and number of staff, there are times when the engagement of a skilled consultant is needed. I heartily recommend experts in my partnership circle who can:

- Oversee human resources, finance, and other areas of the mission
- Serve as a liaison between content areas and the board and leader
- Design staff structures to ensure the right people with the right skill-set are in place
- Address year-end deficits to ensure resource optimization
- Monitor operations and provide big picture recommendations to enhance efficiency

And, oh so much more! If you are looking for a certain skill set, I am happy to connect you with a superbly talented group of independent consultants.

TOUCH POINT: CLIENT SPOTLIGHT

Community Mental Health Center, Inc.

Community Mental Health Center, Inc., in operation since 1967, is a provider of comprehensive behavioral health services. Its mission (Partnering for Wellness: Healthy Mind. Healthy Body. Healthy Life) is carried out through teamwork among staff members, patients, and a variety of resources in the Southeastern Indiana Counties of Dearborn, Franklin, Ohio, Ripley, and Switzerland. Offices are located in Lawrenceburg, Batesville, Brookville, St. Leon and Vevay.

CMHC annually serves more than 5,000 clients of all ages, from infants to older adults. Staff members are engaged with community stakeholders on a variety of levels, including systems of care, hospitals, crisis intervention teams, and human services agencies such as local offices of the Indiana Department of Child Services. The work is supported by the recently-established Community Mental Health Foundation, Inc., a nonprofit organization.

The organization offers: outpatient counseling, recovery services, school-based services, home-based services, community-based support services, case management services, housing services community-assisted supported employment services, inpatient hospitalization, intensive family-based services, medication management, and primary care integration.

CMHC is also licensed as a psychiatric hospital by the Indiana Division of Mental Health and Addiction. And, it is certified by the Division as a community mental health center, a residential services provider, and a managed care provider for seriously mentally ill adults, seriously emotionally disturbed children and adolescents, and individual with substance use disorders. CMHC is endorsed by the Division as a provider of compulsive gambling services. CMHC is accredited by CARF.

Additional information may be accessed through its website or by calling 812-537-1202. Emergency services are available 24 hours a day, seven days a week by calling 812-537-1302.

End Point

We don't know what we don't know. Good outcomes start with good planning, questions and data. It all begins with a curious mind and ends with limitless possibilities for your organization!

To spring!

Marta

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