



Marta Brockmeyer, Ph.D. Project Pointers

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POISED FOR PARTNERSHIP



It's summertime and the living is easy. Who am I kidding? This summer has been among my busiest ever. Along with a fully booked calendar and several complex projects, I've been preparing for upcoming surgery and dealing with the challenges that come from any extended office absence. But in the middle of all of this, I made time for essential relationships and self-care. I managed four trips to visit lifelong friends and nurtured myself with Broadway plays and baseball. Granted, my longer term "to do" list still has too many items on it, but what I'll remember in a year is the time with loved ones and what it took to effectively meet all current professional commitments. Life and summer are short - let's remember to power down occasionally.

TURNING POINT



To Head Off a Partnership Meltdown, Avoid These 5 Mistakes

Yes, mistakes do happen! And while people work hard to limit stress and bypass false steps, real life creeps in when least expected. More and more, so much of my work focuses on strategies to minimize or head off potential problems. A positive attitude about partnerships should never replace a cautious approach or tendency toward magical thinking. Key mistakes can quickly derail progress so I offer a few to avoid. [Click here to continue reading...](#)

VIEWPOINT: IN MY EXPERIENCE



I never know what questions will pop up when the phone rings! Here are a few recent ones:

How do we handle a sudden CEO departure?

It is always easier to experience a timed opening at the top of the organization chart. But when the leader leaves suddenly, a more planful approach to succession may not be possible. The response to this depends on many factors operating within the organization as well as environmental factors. You may be fortunate enough to have a skilled staff

member who can maintain stability while a search is being conducted, or a board member may resign from the board and volunteer services for a limited time. And while I normally would not recommend this, healthy, smaller nonprofits might function without a leader for a certain period of time. Hiring an interim CEO is usually the best option while the board, staff and stakeholders thoughtfully consider what the nonprofit needs. And, an unexpected departure often presents the perfect time for exploring a merger.

I'm working on an integration team and we're floundering. Suggestions?

It is normal to experience some confusion -- or an occasional bad day -- when working on an important project. But if the stagnation is recurring, then it's time to return to the basics. Often, groups are concentrating so much on tasks, they fail to discuss how they will work together. An agreement on norms and expectations helps people stay focused. Another critical requirement for staying focused is documentation. Meeting notes should be routed following each meeting, and someone must be responsible for updating tasks lists and due dates. Things generally go more smoothly when one person is responsible for updating records, although some groups prefer to rotate the recording duties. Finally, it often helps to stop and think about the single most important element in planning: what is best for clients. By simply asking this question occasionally, teams can refocus and remind themselves of why they are working together.

How do we build trust among staff members who just met?

In a merger, many employees have never met people at the other organization. The absolute quickest and best way to build a new culture is to get people working together as soon as possible. Meetings between departments are especially helpful during the first few weeks because staff can then put the proverbial face to the name when they call a counterpart. As many people as possible should serve on integration teams because this allows employees to work together in designing something new. And, a series of celebratory events can infuse the work tasks with a sense of fun and accomplishment.

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

TALKING POINTS



"I truly appreciate all of the help you provided... meetings, emails, documents were tremendously helpful as the work groups are meeting. We are doing all we can to attempt a smooth transition as we approach our merger date."

-- Project Manager, merger client

"I do not know a more ethical or professional person."

-- CEO, merger client

"You are making such a difference in the nonprofit community -- we are lucky to have you!"

-- CEO, multi-county nonprofit

POINTING TO A GOOD READ



Heat, rain, allergies, our political environment... [click here](#) for good books to offset them.

PARTNER SERVICES SPOTLIGHT



I work with a group of highly experienced and talented independent consultants who offer a wide range of services. And, they bring local nonprofit experience. Most have home offices with low overhead, a savings that is reflected in lower rates. Some of the most requested services include but are not limited to the following:

Communications Consulting

Message Development.

Strategic and crisis communications by crafting a compelling message, one that connects to your audience.

Media Coaching.

Preparation for interviews, presentations and speeches, through public speaking coaching and media interview training.

Media Relations.

Comprehensive and successful local, regional and national media placements.

Diversity Outreach.

Proven success in effectively reaching diverse audiences through a variety of platforms, including targeted media relations, grassroots activities and community engagement.

Let me know if you'd like to learn more about my partners and their amazing array of services.

WORKSHOP REMINDER



Project Management Basics

A complex project can seem overwhelming, but not when you have the right tools and processes. Join Marta for her essential Project Management Basics Workshop, where you will learn new skills and methods to tackle your most difficult assignments. Past participants applaud the training and recommend it for its practicality and impact on their organization!

Interact for Health will be offering some of their popular classes for nonprofits in communities throughout Greater Cincinnati. The Project Management Basics Workshop will be presented for the first time in Grant County at the Grant County Public Library in November and again at Interact for Health in December.

Project Management Basics
[Course Outline](#)

November 12, 9:30 a.m. - 12:30 p.m.

Grant County Public Library
201 Barnes Road
Williamstown, Kentucky 41097

December 3, 9:00 - 12:00 noon

Interact for Health
500 Edwards Road, Suite 500
Cincinnati, Ohio 45209

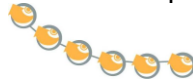
WORKSHOP REGISTRATION

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 complements the foundational workshop. Evaluations from recent on-site trainings have been enthusiastic. Please contact Marta for more information about in-house, customized training.

End Point

Seasons change, but overloaded schedules seem to remain constant. Make sure you are taking time to rest, recharge and restore so that you can live your best life, and do your best work. And, nurture those important relationships as we roll towards autumn.



Best wishes,



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