



# Marta Brockmeyer, Ph.D. Project Pointers

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## POISED FOR PARTNERSHIP



While consultants, workshop presenters and podcast speakers can offer good counsel about partnerships, leaders understandably want to hear from other executive directors about their experiences. I have added a new section to the newsletter and will be asking former clients what they felt was important as they went through the partnership process. Every partnership I've facilitated has brought new experiences, new relationships and new learning. I'm happy to share the wisdom of your colleagues, and hope you enjoy this new feature.

## TURNING POINT



### The Importance of Culture

My clients often focus on the process of partnership, with good reason. Due diligence is a responsibility, and investing the necessary time is critical for success. But even with a beautiful process, implementation can be sabotaged with a culture clash. To avoid this, don't underestimate the importance of addressing this early and often, and be sure to include culture conversations early in the process. [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:

### **What is the biggest obstacle when groups consider launching a partnership exploration?**

Having observed countless early discussions, one barrier inevitably surfaces. Usually, neither organization has developed partnership criteria, and this makes further study difficult. In some cases, a nonprofit is desperately seeking a savior, in others the board may simply assume any other board would be thrilled to be identified with them. To avoid going after the money or wasting precious time talking to the wrong groups, the board should have a structured conversation about the type of partner it wants. These criteria can be distilled into a few bullet points or a short paragraph, then everyone is moving in the same direction and decisions are easier to make.

### **How do we prepare the boards to make an informed merger vote?**

Communicate, communicate, communicate. I was shocked recently when a CEO mentioned casually that she had not been giving the board regular updates on the exploration process. From the moment the board selects its Steering Committee members who will negotiate with

the other organization's representatives, the exploration should be a regular item on the board agenda. Equally important, the leader and committee members should talk individually with other board members to gather their suggestions and learn of their concerns. This extra effort will pay off as things progress, and board members will never be surprised by what they were not told. By the time the board votes, most members are fully informed and primed to approve the combination.

### **Where should the Steering Committee meet?**

Because the meetings typically occur over many months, the location is important. An informal, neutral location with parking is ideal. Unless the staffs already know about the partnership talks, committee members who are meeting in one of the nonprofits will likely be observed, and rumors will start. Also, if the meetings always occur in one of the organization's buildings, a subtle power advantage may develop. Even if a neutral site is offered by one of the committee members, the absence of nonprofit logos and clients moving about in the space can be beneficial. I also suggest that all meetings occur at the same address, in a quiet room that offers large tables and a place for refreshments. Overly formal conference rooms have a chilling impact on negotiations. Meetings for one of my projects that did not result in a merger were held in a formal downtown law office's conference room, and the space reinforced what was already an adversarial atmosphere.

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

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## **A Client's Perspective: Pointing to Real World Lessons**

Jeff O'Neil, President & CEO, Greater Cincinnati Behavioral Health Services, Inc.

Strategic unions such as mergers and affiliations will be challenging ventures even under the best of intentions and circumstances. A skilled, experienced facilitator (in this case we used the excellent services of Marta Brockmeyer) will be invaluable as a conduit to help guide you through the processes. As such, here are a few key things that have helped for success in both the exploration and integration phases:

- **Agree on the ultimate outcome of the relationship.** This may initially be an unknown, however, it should be a main goal of the exploration phase. We found a good analogy to be the typical dating-to-marriage process. Important questions to answer together related to strategic intent include ... *"Why would we do this?" "Where is this going?" "What will we look like?"* This will also help avoid confusion later in the formation processes and will give way to clarifying issues related to motivation, intention, commitment, organizational structures, etc.
- **Do the due diligence.** It is important to conduct mutual discovery processes and include key leaders, board members and facilitators. Together, they review and report on each organization's status in areas such as mission, financial, legal/HR, IT and systems, services, board governance, strategic intents, workforce, work cultures, etc. This will also help in identifying areas of strengths, weaknesses, opportunities and alignment.
- **Deal Breakers.** Get them on the table early with CEOs and Board Chairs. Be direct, honest and specific. They should be major, not petty things. They can also be negative issues discovered in the due diligence. Don't invent any deal breakers if there aren't any! If any are identified, contemplate them with questions such as *"Can it be accommodated?" "Can it be resolved within a necessary timeframe?" "If irreparable, can we live with it or is it too problematic to move forward at this time?"*

- **Don't try to do everything at once.** The integration phase should be well-structured with a plan and work teams that have specific charges. Everything will "feel" important and the biggest challenge here will be to stay disciplined within the overall plan. Practicing continuous prioritization of what must occur at any given time is imperative. This also galvanizes leadership and helps protect staff resources, time and energy.

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## POINTING TO A GOOD READ



[Click here](#) for some reading suggestions...

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## TOUCH POINT: CLIENT SPOTLIGHT



I had the honor of supporting Cincinnati Early Learning Centers, and Children, Inc. as they explored the possibility of a merger. After a thorough due diligence process, the boards voted to create a combined organization, Learning Grove.

This newly formed nonprofit will serve more than 3,200 children annually in its early care and education programs. Learning Grove's holistic and innovative programming continuum will assist children and families prenatally through college, including career-readiness. Some of their well-known services include childcare, preschool, before and after-school care, parenting supports, professional coaching, and college/career planning. The two organizations have operated multiple services in Greater Cincinnati and Northern Kentucky for more than 40 years.

For more information: [info@learning-grove.org](mailto:info@learning-grove.org)

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## End Point

Successful partnerships, like most things in life, are both art and science. They require you to embrace best practice, both in processes and principles. Here's hoping you find the balance in life this fall that makes everything better!



Best wishes,

*Marta*

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**Marta Brockmeyer, Ph.D. | [Marta@MartaBrockmeyer.com](mailto:Marta@MartaBrockmeyer.com) | <http://martabrockmeyer.com>**

Marta Brockmeyer, Ph.D., 553 East 4th Street, Newport, KY 41071

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