



# Marta Brockmeyer, Ph.D. Project Pointers

Issue 38

Spring 2015

## In This Issue

Partnership Exploration -  
How Does it Feel?  
Workshop Announcement  
Client Spotlight

## Quick Links

Workshop Registration  
Last Month's Newsletter  
Marta's Website

Colleagues are often surprised when I talk about one key consideration in a partnership exploration: emotions. Having facilitated almost thirty such projects, I am now sure that feelings impact the process more than thinking. Even linear thinkers who thrive on charts and plans may be unable to override the weight of their emotions once things start rolling along.

One strategy to balance these conflicting factors is the adoption of realistic expectations. When an executive director asks what to expect during the process, we review a wide range of scenarios and the likely, often surprising, emotional responses. Simply, what will it feel like to go through this? This issue of the newsletter will address some of the typical emotions that accompany a merger exploration.

## How Does it Feel?

**Honorable.** Making a decision that is best for clients and the community can be difficult. The decision may not necessarily align with the leader's personal goals and needs. And, the board may resist merger discussions for fear of losing organizational identity, reputation and donors. When the leaders shift to possibilities, past these immediate concerns, everyone can focus on sustaining the mission. This type of stewardship frees mature participants to embrace the possibilities and conduct due diligence within the midst of uncertainty. Doing the right thing is its own reward - and usually leads to positive outcomes.

**Exciting.** Ok, it really is a big deal! The majority of my clients consider the merger planning to be the most exciting project of their career. During a time of so many constraints and demands in the human services world, a partnership exploration is expansive, brave and even fun. And no two working hours are the same, as the leaders bounce back and forth between vision moments and operational details. The collective energy level kicks up as participants enjoy new faces and new ideas. The landscape is intriguing and compelling.

**Developmental.** Leaders talk about the project's impact on continuous learning and professional growth. The most effective executives familiarize themselves with their partner's programs, some of which may include new content knowledge. Interpersonal skills often grow during this exploration as well. Executive coaches can be especially helpful as a leader transitions into a larger, more complex role, one that can be lonely.

A CEO's self awareness ultimately helps the organization. It is natural for a leader to have moments of doubt, wondering if she is up to the task. This reflection almost always results in a resoundingly positive response. But two of my merger projects ended because one of the leaders could not face being a direct report. In another, the process quickly highlighted the limitations of one executive director, who chose to leave before the boards even voted. Sadly, honest self-reflection earlier would have saved a lot of resources.

**Stressful.** You bet. Nonprofit leaders already face a staggering array of work. Layering a hugely time-consuming process *on top of regular duties* can be exhausting. Duties cannot be put on hold until the merger vote occurs, so delegating and pacing are key. Anything that can be delayed for a few months should be. This is not the time for generating a lot of new initiatives; it will be stressful enough trying to keep up with what is already in place.

Multiple distractions and uncertainty are also draining. And, there are few chapters in a nonprofit's history that include more uncertainty than this. The merger steering committee members and CEOs willingly make a commitment to closely study each other and make recommendations to the boards. The boards, ultimately, make a leap of faith when they vote to combine. Even if that decision rests on rock solid analysis, a guarantee of good outcomes is impossible. In the meantime, so many organizational issues depend on whether or not the merger will go forward. The people who do know about the possibility may feel stuck or stressed because they cannot start planning something.

**Awkward.** The five words I hear most are "I can't open my mouth." This is especially true during the merger negotiations phase when a casual comment can result in a security leak. No matter how skilled someone is at maintaining boundaries, it is uncomfortable to be less than forthcoming with colleagues and friends. Board members occasionally talk about the stress of not sharing such a big secret with their spouse. It is difficult to overstate the burden that confidentiality places on the board and senior leadership team.

Staff members usually do not know about merger discussions. This also puts the leaders in the challenging position of not being able to talk about the biggest issue of the day. They may give the impression of being unresponsive or not caring about the nonprofit's daily work. It is not unusual for morale to suffer during this period, as staff may feel a lack of communication or direction.

**Out of control.** It takes courage for a leader to voluntarily set aside the familiar for the greater good. Early in the partnership discussions, a CEO may talk about giving up control in some theoretical way. But as the process continues in more specific ways, reality may lead to headaches and resentment. Someone who is used to making decisions alone must now confer with another CEO on just about everything. The hundreds of details related to policies and culture require constant discussions, even negotiations. These feelings can be even more challenging for the executive director who does not become the leader of the combined organization. Retiring executives are spared some of these losses, but an executive director who becomes a direct report faces unique feelings about autonomy and control.

**Mournful.** This type of project inevitably evokes some level of grief. No matter how excited leaders are, most mourn the loss of life as they knew it. The organization will never be the same, an especially bittersweet feeling for a founder, and may lose some unique characteristics and charm. Despite the widespread acceptance of merger as a standard business tool, executive directors may feel they have failed to provide good stewardship. Most move through the grief in a healthy way, resulting in the proverbial "door opens" attitude.

**Satisfying.** Is it worth it? I need only look at CEOs who wholeheartedly embraced a new vision to better serve their clients. Increased funding, tighter operations and new professional development opportunities are improvements to celebrate. No matter how difficult any particular day was, without exception, these leaders never lost sight of what truly mattered. When they talk about the feeling of accomplishment, certainty and joy fill the room.

My best,



## Workshop Announcement Project Management Basics

Marta's popular Project Management Basics workshop will be offered on September 22, 2015. This workshop receives consistently high marks from participants.

Project Management Basics  
Tuesday, September 22nd  
9:00 a.m. - 12:00 p.m.  
at Interact for Health  
3805 Edwards Road, Suite 500,  
Cincinnati, OH 45209

Register online at [Workshop Registration](#)

**Client Spotlight**  
**Greater Cincinnati Behavioral**  
**Health Services, Inc.**

As you may know, last year brought the exciting merger of Greater Cincinnati Behavioral Health Services, Clermont Recovery Center and LifePoint Solutions. These three organizations joined forces to create one of the true success stories in our human services community. The merged entity, **Greater Cincinnati Behavioral Health Services (GCB)**, has blended the many strengths of the three to create an even more dynamic organization. The comprehensive service range now includes psychiatry, case management, primary health care, vocational services, counseling, family and school-based services, substance abuse prevention, treatment services and more.

In addition to the expanded service offerings, GCB has also been awarded several new contracts, grants, partnerships and funding. GCB now employs over 500 professionals serving more than 12,000 clients in Hamilton and Clermont Counties and Northern Kentucky.

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