



## Marta Brockmeyer, Ph.D. Project Pointers

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POISED FOR PARTNERSHIP



I hit the refresh button for autumn: new look, new content, new projects and focus. Over the summer, I thought about which area partnerships have been successful. During this period, I shared my observations and concerns with funders and colleagues, all of whom were helpful. I typically work with organizations from the early days of discussion through the formal vote to create some type of alliance. For many clients, I continue to support integration.

In the case of those projects that were disappointing to participants, two key issues emerged. Interestingly, these land at the beginning and end of a process: the middle of the exploration usually goes well. First, many organizations lack an understanding of their health and are not in a state of readiness or sustainability. Without self-knowledge, they jump into a formal partnership review too soon. Second, organizations do not make the commitment to continue planning after the decision is made to work together or legally combine. So, integration unravels quickly and folks do not feel good about the current environment, much less the past.

**To help address these gaps, I have developed two new services:**

### **Are You Ready to Partner?**

Are you ready for the next great opportunity to strengthen your organization and further your mission? To learn more, [click here](#).

### **Is Your Partnership on Track?**

Are you realizing your dreams for the combined organizations? Have you been able to implement your plans? To read more, [click here](#).

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## SITTING WITH THE STRESS

As we move into fall, it is good to remind ourselves of the high cost of stress. It wears on us physically, emotionally and cognitively, making it more difficult to be strategic and compassionate professionals. Stress also results in financial loss. A sleep-deprived CEO struggles to impress a potential donor, an overly-committed development officer submits a sloppy grant proposal . . . the list goes on. While the anxiety may be generalized, the **impact is concrete.**

We can't always select our tasks and responsibilities. But when we do get to choose, spending a couple of intentional minutes can head off additional stress. Recent conversations with clients, combined with a few challenging situations from my own practice, led me to create ten simple questions that may be helpful in managing stress.

1. Is this meeting necessary?
2. Will this investment pay off enough to justify the energy it will take?
3. Can I control this and do I need to?
4. Must I lead this?
5. Can I move to a support role?
6. I don't like this colleague, but what can I appreciate about him?
7. How likely is this to move me toward my goals?
8. What will happen if I say no?
9. At what point can I say this just isn't going to work?
10. Is doing this making it harder to be kind to myself and others?

Please give these a try! Last week, I avoided making two commitments that would have distracted me from helping current clients and, ultimately, the people who depend on their services.



"Thank you for everything regarding the merger; the merged organization is indeed stronger in all areas. I was struck by the unique sense of passion and compassion you voiced in relation to the staff. You are gentle but firm. You encourage others and challenge them to think differently. You are truly a gift."

--Senior leader, behavioral health organization



When the phone rings, the first words I often hear are, "This may be a silly question, but..." Since the questions frequently cover similar ground and fall into categories, I thought it might be helpful to share a few. And, of course, the responses reflect only one consultant's experiences.

**Q. What kind of partner would be most helpful?**

A. In general, it helps to select one or more nonprofits that offer different but complementary services. Instead of increasing the number of clients who receive the services you currently provide, think in terms of expanding the offerings. A wider range of programming, offered under one umbrella, can simplify access for individuals as well as increase your funding options.



**Q. Will a collaborative effort interfere with our own fundraising?**

A. Not in the least. Organizations considering a formal partnership or merger should each continue with their individual fundraising to meet their respective revenue goals. It should be "business as usual" to continue receiving community support. In some cases, the emerging partnership may actually increase fundraising opportunities if individual donors and funders believe service delivery will expand and improve. During integration, the leaders may benefit from the expertise of an outside fundraising expert who will evaluate the existing development departments and make recommendations regarding a suitable structure, methods of fundraising, and revenue goals once the merger is complete.

**Q. If we want to explore a merger, how long will it take?**

A. CEOs and their board chairs may have informal discussions for months before the two boards vote to approve a merger exploration. Once each board has selected its members for the steering team, the negotiations phase (including due diligence) usually takes four-to-six months.

If the boards vote to approve the merger, the implementation phase follows. This period typically is completed within a few weeks. The legal documents are crafted and other key, formal papers are created and signed.

The most time-consuming phase is integration, the third phase when programs, systems, people and goals are combined. Of course, some cultural shifts will take many years. But a timeline of eighteen to twenty-four months is a good guideline for most mergers.

**Please forward your questions.** I'll include them (anonymously) in a future newsletter and also follow-up individually.

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## POINTED TO THE RIGHT PERSON



It can be hard to know where to find a trustworthy professional, one that shares your values and will be a good resource investment. Whether you are looking for help with a one time project or an ongoing relationship with a specialist, I can help.

Over the years, I have developed a circle of exceptional colleagues whose skills complement mine. If you are looking for just the right person, don't hesitate to ask. I would be happy to refer an individual or can quickly assemble a team to meet your needs.

My partners provide expertise in the following:

FUND DEVELOPMENT

HUMAN RESOURCE

COMMUNICATIONS  
PUBLIC RELATIONS

FINANCIAL MANAGEMENT  
FORECASTING

INTEGRATED HEALTH SERVICES  
MANAGEMENT

PLANNING ENTERPRISE  
DEVELOPMENT

TRANSITIONAL LEADERSHIP

ORGANIZATIONAL DEVELOPMENT  
COACHING

PROJECT MANAGEMENT

EVALUATION

ADMINISTRATIVE  
SERVICES

## SWEET FINALE!

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### WORKSHOP REMINDER

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 22, 9:00 a.m. - 12:00 p.m.  
at Interact for Health  
3805 Edwards Road, Suite 500  
Cincinnati, OH 45209

Project Management Basics will be offered again on March 3 and September 20, 2016

### WORKSHOP REGISTRATION

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There is so much going on and we can easily feel overwhelmed or simply disengage. We all need occasional breaks to think and prioritize, but we mainly need each other. One of the happiest moments of my summer was watching colleagues enjoy the [Leadership Council's social event](#). Partnerships grow from shared good will: an excellent start for autumn.

Best Wishes,



Marta Brockmeyer, Ph.D.

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### TOUCH POINT: CLIENT SPOTLIGHT

For 150 years, the Children's Home of Cincinnati has been a leading provider of services and treatment that transforms the lives of children and families in Cincinnati. Founded as an orphanage in 1864, the Children's Home has evolved in response to social issues and the evolution of clinical practice. Well known for innovative practices related to behavioral health treatment and therapeutic education, our current efforts are focused on health and wellness and integrating children's mental, social and developmental needs with their physical health needs.

The Children's Home serves over 6,500 children and families each year. Recognizing that the children and their families have many needs, and that healthy eating often does not rise to the top of the list, The Children's Home acquired the Nutrition Council in August, 2015. This new affiliation will allow for the provision of medical nutrition therapy; promote nutrition education in the classroom setting; and afford the children and their families the opportunity to participate in onsite cooking classes.



Amazing stories. Created daily.

[Children's Home website](#)



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