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Project Pointers

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POISED FOR PARTNERSHIP

What's in a number? I recently started partnership project **#30**, a number that amazes me. The work has brought professional growth and great joy. I am indeed fortunate to begin the year in the company of my wonderful nonprofit colleagues.

For a variety of reasons, these partnership explorations frequently begin in January. The holiday break provides rest and fresh energy, and a new calendar may signal available resources. At the same time, January is a natural time to evaluate current partnerships and clarify which are effective. Human services professionals tend to be hardwired to their commitments, so questioning the value of a relationship or membership in a group is difficult. Often, it is easier to continue attending meetings than to question the value of participation. Here are a few criteria to consider:

Do I even know if this partnership is effective? What has the group done to measure its efforts?

Will my organization's commitment to this combined effort prevent us from doing something else that would be more helpful to others?

Are the political benefits important enough to continue with the partnership?

Are my partners as engaged as I am? If not, what is missing?

Have I tried enough? How likely is change?

Staying positive while working toward a goal is commendable, but the consequences of staying too long can be substantial. For example, if merger partners do not accept obvious roadblocks and continue meeting anyway, unnecessary expenses can result. More importantly, participants will be drained of positive energy and left with bad feelings about the exploration and possibly about one another. Board members and executive directors may feel that stopping the process is the same as failing or giving up, although it shows great strength. As I have mentioned in previous newsletters, some of my strongest clients had the courage to walk away and are now leading thriving organizations as a result of that good decision.

TURNING POINT

Ethics, Secrets, Drama

Confidentiality can be a challenging issue for any nonprofit. There may be an inherent conflict between honoring a relationship with a colleague and doing what you know is best for the organization or client. I could write for hours about some of the ethical dilemmas I've faced with partnership projects and most were ones I would not have anticipated. Over the years, however, a few confidentiality guidelines have been helpful:

1. The value of a confidentiality agreement is the experience of signing it. The ritual is powerful and will be remembered far longer than any words in the document. The concrete meaning of confidentiality comes to life when a committee hammers out details and specific examples.

2. Most of us have an internal ethics meter that serves us well. If you feel any hint of discomfort about hearing or sharing something that you should not, I would think twice before continuing with the discussion. The key is *paying attention*, especially with delicate topics.

3. At the beginning of a sensitive conversation, state upfront whether you will share any of it and explain how you intend to use the information.

4. Be clear about whether information will be shared or kept confidential. And, if the person wishes to remain anonymous, you cannot pass along any personally-identifiable details.

5. If someone asks you to not share their comments, tell them you will honor their wish. But also state that anything they say may inform the process and outcome. In most cases, you can share perceptions or even give advice based on what you have learned.

6. Do not use documents from Task A for Task B without the permission of the author, especially if the documents reflect the work of a group with members from various organizations.

7. You are not required to answer every casual question even if it seems rude to remain silent. In some cases, the question is inappropriate or poorly timed.

8. It is fine to say, "I'm sorry but I cannot discuss that." This may be the only way to honor a confidence. You may also need to add, "And I can't tell you why right now but I will when or if I can."

9. Even if you and the other person have not explicitly discussed confidentiality, ask yourself if the content was intended to be kept between you and the person who told you. And does it have any meaningful impact on what is being planned right now?

10. A good rule of thumb is: Is this my news to share?

11. When in doubt, think about how you would feel if a third party learned what you had said to someone privately.

12. Sharing details of a private conversation may diminish someone's confidence in you, a shift that may impact many aspects of your work.

VIEWPOINT: IN MY EXPERIENCE

Thanks to those who commented on the new section of the newsletter. And, yes, keep those questions coming! Here are three recent ones:

Q. When do we tell the staff?

A. This depends on what the staff will be told. The CEOs and board members usually discuss a communication plan long before the negotiations committee has its first meeting. Then, the committee further develops guidelines for all to follow.

Some partners decide to immediately tell both staffs that partnership options are being discussed, knowing this will essentially make the negotiations public. In those cases, an honest statement of fact may be all that is needed. I will never forget the group of employees who were angry about the leader's misrepresentation of the process -- and how long it took him to regain their trust.

Even if the staff is not informed, the senior leadership team has to actively support the merger negotiating discussions. The heads of finance, HR, programs and IT will be busier than usual and this in itself may raise eyebrows. They may need extra coaching to help them stick with the approved messages about what is going on.

Some partners decide to keep the negotiations a secret until the two boards vote in favor of a merger. Usually this reflects heightened sensitivity about important stakeholders, funding or the political climate. In this type of situation, it is important to tell the staff why the negotiations had to remain confidential. A few cynics will dismiss this claim, but most will understand the need for confidentiality. Once the merger is announced, immediately launch regular, informative updates for staff and volunteers.

Q. How much will a merger exploration cost?

A. Costs are a function of the size and complexity of the organizations, number of months the board representatives wish to meet, and the styles of the executive directors. The initial phase of the exploration (negotiations) may include expenses such as meeting supplies, major copying expenses, consultant fees, legal fees and more. In addition to hiring a facilitator, content experts may be needed for HR, real estate or finance. And there is a cost to everyone's time, a variable that is easy to overlook. For a fairly straightforward merger exploration between two smaller organizations, the total negotiations costs may be under $20,000. For two larger organizations with complicated finances, the exploration phase alone may well run $60,000 or more; the entire budget for integrating two large organizations can be hundreds of thousands of dollars.

As a rule, a merger will not save money for the first couple of years. The actual merger process itself will negate any immediate cost savings in almost all cases. Think of all the changes that require an investment: signage, print collateral, public relations, new employee manuals, moves or renovations, etc. Once the dust has settled, the process costs should be offset by the benefits of joint administrative functions and the typically improved fundraising options. As always, this type of partnership consideration should never be regarded as a way to save a failing nonprofit.

Q. Why do we need an outside facilitator? Can't we do this by ourselves?

A. Yes, of course you can explore a partnership without using an outside expert. But first, think about the current emotional landscape, your history of working with the identified partner, and your organization's state of readiness for these discussions. A board member should never facilitate the process, and it may be difficult for a staff facilitator to balance the competing needs of two organizations.

Most groups decide they cannot successfully complete the negotiations phase without a neutral outsider. Someone must be charged with leading difficult conversations and safeguarding the process, a tough assignment for an internal stakeholder. The decision to select an outside person is usually made for many reasons, and it serves as a preview of discussions to come. Selecting the facilitator, whether paid or volunteer, is one of the first joint decisions the group makes and it can reveal a lot about style and values. In some cases, an experienced volunteer can be as effective as a paid consultant.

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

TALKING POINTS

"Thank you all of your help and support. Your wise counsel over the last few months is one of the things for which I am most grateful this year."

--CEO, behavioral health organization

"Thank so much for your support and leadership during this process. It was a better experience because you were involved."

--Chief Operating Officer, housing nonprofit

Wish for 2016

New Year's Eve can be challenging because of its prescribed cheer and gaiety. So I was delighted when a friend suggested we say "Good New Year" instead of "Happy New Year." As he said, "Who could be happy for an entire year?" Instead, let's think about good health, good travels, good friends, good family situations, good life and good outcomes for our clients. My wish for you!

Marita

WORKSHOP REMINDER

Marta's popular Project Management Basics workshop will be offered on March 3, 2016. This workshop receives consistently high marks from participants.

Project Management Basics

Thursday, March 3, 2016, 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 September 20, 2016

WORKSHOP REGISTRATION

In-house Training

Some organizations prefer to offer Project Management Basics on site for convenience and increased participation. In some cases, a series of follow-up activities complement the foundational workshop and help shift the planning culture. Please contact Marta for more information about in-house, customized training.

TOUCH POINT: CLIENT SPOTLIGHT

Over-the-Rhine Community Housing

Over-the-Rhine Community Housing (OTRCH) is a non-profit community development organization that provides a wide spectrum of affordable and supportive housing options with life-changing programs that help low-income residents in Over-the-Rhine succeed. For over four decades, OTRCH has never wavered from its commitment to:

1. Build a sustainable, diverse neighborhood that values and benefits low-income residents,
2. Create an inclusive community in this evolving historic district, and
3. Advocate on behalf of its residents.

To meet this mission, OTRCH has restored 92 properties (420 housing units) and assembled a broad mix of 20+ service providers/agency partners to ensure that residents receive affordable housing along with access to health care, job services, education, faith-based services and community associations that strengthen their ability to succeed.

They meet clients where they are, providing compassionate, trauma-informed services to some of the longest-term homeless individuals in our community, including those struggling with addiction and mental health issues.

Consistent with its mission and guiding purpose, the organization also work to ensure that existing, low-wealth residents benefit from neighborhood revitalization initiatives. As Over-the-Rhine continues to evolve, this excellent nonprofit will continue to provide housing and support in partnership with the low-income community.

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Over-the Rhine Community Housing website

When I think about organizations that model good communication and a commitment to partnerships, the Leadership Council of Human Services Executives immediately comes to mind. It offers a range of benefits, including educational opportunities. The upcoming workshop on coaching would be helpful to anyone considering or engaged in partnership efforts. So often, these skills positively influence the process of bringing together cultures.

UNLEASHING POTENTIAL THROUGH IMPACTFUL COACHING

Presented by Tom Heuer
February 4, 2016, 8:30-11:30 a.m.
Interact for Health
3805 Edwards Road, 5th Floor

This session is geared to senior executives and their direct reports.

Click HERE to register

Partnership Values

The success of a project depends on the alignment of consultant and client values. Marta seeks nonprofit partners who share the following:

- True commitment to change
- Focus on mission and client services, not egos
- Fairness and an inclusive process
- Active listening with heart and attention
- Intentional thinking and dedicated time for planning
- Respect and support for board, staff and volunteers
- Direct, compassionate communication
- Proactive attention to detail
- Enjoyment of learning together