



# Marta Brockmeyer, Ph.D. Project Pointers

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## POISED FOR PARTNERSHIP



I've been thinking about our relationship with time this spring. When two projects ended early, I used the unexpected gift of time to review my task lists, schedules, challenges, and typical responses. I quickly saw recurring themes that require some change.

This review has already helped me reframe things to make more intentional choices. Of course, some aspects of our work must be tackled. But it does help to be clear about whether you are initiating, responding because you must, or taking a leadership role because it is the appropriate thing to do.

If you are currently engaged in partnership exploration or merger integration, you already know how stressful the extra time demands can be. You probably cannot attend to all of your regular tasks as well as those required by the new collaboration. This spring may be the perfect season to rethink what you retain or delegate, an assessment that will pay off all year.

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## TURNING POINT



### Culture Fit

As you and your board discuss potential partners, organizational culture will be a key topic. Understanding the cultural health of an organization can be difficult before and even during formal negotiations, but here are a few signs to watch:

1. The office environment is professional and attractive, with accessible files and materials. Visitors are welcomed, assisted by clear building signage. Employees and volunteers meet dress standards while they work in clean, well-lighted work areas.
2. The CEO's words and actions are consistent. She supports employees in their professional development and gives clear directives to the senior leadership team. If the director also founded the nonprofit, she separates ego from sustainability decisions.
3. The senior leadership team carries out the CEO's plans and follows up with staff to ensure compliance. Policies and procedures are explained clearly; collaboration across departments is modeled. Even when individual members disagree, they project a united front after a decision has been made.

4. Employees treat each other with respect while producing good outcomes. The selection process for new staff is fair, and a simple evaluation system is understood by all. A culture of professional development allows each employee to improve skills.
5. Board members are engaged and attend meetings. Term limits are honored and each trustee makes a financial contribution. Board development is ongoing.
6. Volunteers are valued for their skills and time. They serve as an integral part of organizational life and work in spaces that are safe and welcoming.
7. Decision making is aligned with the mission and institutional values. A culture of experimentation and entrepreneurship exists. Information is shared freely, within the limits of client confidentiality or agreements across agencies.

Measuring these partnership standards should allow you to craft additional, in depth questions for the possible partner. If you sense the absence of these qualities and the other organization balks at allowing you to assess them, you may want to reconsider your goals.

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### VIEWPOINT: IN MY EXPERIENCE



Thanks to those who submitted questions - here are a few recent ones:

**Q.** If we're exploring a partnership, should we still do strategic planning?

- A.** The answer depends in part on the type of partnership and timing. If you are collaborating with one or more organizations for a short term joint effort, then the timing of your nonprofit's strategic planning may not matter greatly. You may already operate under a broad, umbrella partnership goal that covers the current joint initiative, so the new effort might not require a revised plan.

As collaboration moves up the partnership continuum toward full corporate integration, you may wish to delay any additional strategic planning for your individual nonprofit. If your current plan has expired and you are just beginning merger negotiations, an updated strategic plan may provide security and direction. And, there is always the possibility that a combination will not occur. But if negotiations are well along in the process, it makes more sense to wait until a merger decision has been made instead of spending valuable resources on a plan that may soon be replaced.

If a merger is approved, the new board usually launches strategic planning immediately. This has many benefits, including engaging board members who have not yet had the opportunity to work together. It can be a fun, creative project for the staff as well and serve as a good public relations tool. A new strategic plan can capture the passions of those who have worked hard to preserve two or more missions.



**Q. What stops a merger exploration from moving forward?**

**A.** After months of formally exploring a merger, things sometimes stop suddenly. While the majority of formal groups conclude merger negotiations, including due diligence, with a decision to merge, anything can happen along the way. The barriers can be as varied as the people at the table, but fear of change and egos are the most common. It is not unusual for a leader to realize that he or she simply cannot share power or serve as a direct report to the new CEO. It may be that the differences in service philosophies become more clear and problematic. The most blatant situation I've observed was the calculated determination of one board member to sabotage a merger - even after the steering committee had recommended a merger to boards - and he was successful. But the reasons to end an exploration are usually understandable to both parties and are not offered in a negative spirit. Simply, the negotiation phase is just that - the time to learn if a combination makes good sense.

**Q. Who serves on the new board?**

**A.** The composition of the combined, post-merger board is a key governance issue. For organizations that are similar in size, the new board will ideally include the following: one-third from each of the current board rosters and one-third of representatives who do not currently sit on either board. If one nonprofit is significantly smaller than the other, proportional representation may make more sense. For continuity and stability, the current board chairs usually serve on the new board's executive committee. A balance of knowledgeable, seasoned trustees with newer ones can be very helpful during this transition. And, this is the perfect time to return to the basics of board development, looking at skill sets, affiliations and communities.

**Questions?** *Let me know and I'll include them (anonymously) in an upcoming newsletter.*

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**TALKING POINTS**



"I just wanted to thank you again for your guidance and wisdom throughout the process. It is great to have someone so concerned and committed as you working with us on something as important as a potential merger. Please know how much we appreciate your friendship, candor and professionalism."

-- Board Chair, large human service organization

"The Project Management workshop was a HUGE hit. The evaluations were glowing. I have heard excitement about new skills learned from many of the attendees."

-- VP of Client Services, child-serving organization

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**POINTED TO THE RIGHT PERSON**



My circle of independent, excellent professionals has grown during the last year. Whether you are seeking support for a one-time project or want expertise for ongoing efforts, please do ask for suggestions. I encourage you to review my [list of partners](#) to find just the right skill set and I'll be happy to connect you!



As I begin partnership #33, I am reminded that both organizations and colleagues can experience renewal at this time of year. Whether it's a decision to partner, eliminate services, or consciously slow down before scheduling, we can benefit from new seasons and thoughts.

To a rich spring,



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## WORKSHOP REMINDER



Marta's popular Project Management Basics workshop will be offered on March 20, 2016. This workshop receives consistently high marks from participants.

### [Project Management Basics](#)

Tuesday, September 20, 2016, 9:00 a.m. - 12:00 p.m.  
at Interact for Health  
3805 Edwards Road, Suite 500  
Cincinnati, OH 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 complement the foundational workshop. Evaluations from recent on-site trainings have been enthusiastic. Please contact Marta for more information about in-house, customized training.

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## TOUCH POINT: CLIENT SPOTLIGHT



### First Step Home

First Step Home, founded in 1993, is a residential and outpatient substance abuse treatment facility. This addiction treatment agency assists women as they break the cycle of harmful substance use and work toward self-sufficiency. The organization also provides a safe and nurturing environment for their clients' children, up to the age of 12, to heal in an environment that is holistic and homelike.

The Maternal Addiction program includes prenatal medical care, parenting classes, baby care, medications necessary for the maintenance of health and life skills development, assistance with housing, vocational supports and dedicated outreach when women complete the initial treatment phase. Most of the moms find employment and safe housing, and they have no further contact with the justice system.

First Step Home is planning its Rose Award Gala, an event that raises awareness and funds for the continuation of its programs. The event will be held at 6:00 p.m. on May 14 at Cincinnati Woman's Club, 330 Lafayette Avenue, Cincinnati, OH 45220.

The organization's new website will be available soon. In the meantime, please learn more about the Rose Award Gala by contacting [Rachel Lyon](#).



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