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Project Pointers

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POISED FOR PARTNERSHIP

Anyone who has talked to me for long knows of my passion for Manhattan. While reading a book about the history of Greenwich Village recently, I came across a description that made my heart sing: *fizzy with collaboration*. The author used this term to describe a period in the early part of the last century when proactive people from many sectors and content areas came together to address the challenges for those living in the Village. This delightful expression has stuck with me because we are enjoying a similar state in our region right now.

It also has given me a new term for my enthusiastic approach to partnership discussions. I'm looking forward to presenting my views on sustainability and partnerships at the annual Kentucky Nonprofit Network conference next month. The conference will be held in Lexington on October 24 & 25. For more information on registration: [Kentucky Nonprofits Forum](#).

TURNING POINT

We're Talking . . . But Am ***I*** Ready?

Past newsletters have outlined the process to formally explore a partnership, but the period before the official launch requires diligence as well. You may have nagging doubts, even if you have been talking with the other CEO and board chair, presented pros and cons to your own board, and considered the powerful opportunities that the two organizations could discover together. Are you truly ready to embrace the realities of this partnership exploration? The answer to five tough questions should help you decide:

1. Are you sure you can distinguish your mission from your organization?

This may be a difficult notion to grasp, but focusing on what is best for your clients requires the ability to separate the two. Some leaders find it too challenging to focus on the mission without the context of the current building or the entity's legal structure. If you are automatically assuming your partner organization will function within your structure and culture, then you are not ready. Even before formal due diligence begins, you and the other executive director should talk about change options and commitments to preserve both missions.

2. Can you and your staff overcome a rocky history with the other organization?

Hopefully, you enjoy a good relationship at this point, but old impressions often stick. If the previous negative experiences have continued, you may not be able to move forward. If enough time has passed and participants have changed, then you may be ready to pursue a formal exploration. But you still should initiate a candid discussion with your potential partner to compare perspectives on what happened in the past and what to do differently. Of course, once the staff knows about the partnership change, they will need your help in dispelling old rumors and impressions.

During the last two years, I worked on three projects in which the organizations shared a bad history. One overcame it by discussing past misunderstandings and making plans to operate differently; two imploded because of deeply buried animosity that they seemed unable to voice. Had they confronted this earlier, a lot of time and money could have been saved.

3. How will you cope with the inevitable loss of control?

No matter how much you and your board members discuss the need for change, it is almost impossible to know what this feels like until you are in the middle of it. Hundreds of decisions will require conferring or making joint decisions with the other nonprofit. And people on both sides of the table will be required to support decisions with which they may not agree. The best way to answer this question is to look at your personal history of sharing, conflict management and acquiescence. If you tolerate minimal control boundaries and tend to be fair with others, you will probably do well during a partnership exploration - but perhaps not every day.

4. Are you afraid a combined entity would overshadow your personal legacy?

In many ways, the most straightforward situation arises when the leader of one organization is preparing to retire. This eliminates the stress of deciding which of the two CEOs will lead the combined organization. At the same time, a leader who contemplates major changes to a nonprofit usually experiences grief and loss. While the feelings are predictable, they can interfere with the process if left unaddressed. The retiring CEO may feel vulnerable and begin to worry about whether his or her legacy will survive the focus on a new, celebrated entity. Board members may also experience similar feelings of loss, often expressed non-verbally in meetings. Leaders often talk with a valued colleague or professional for support during such an emotional process.

5. Do you trust your partner?

Two aspects of trust must be considered when deciding about a partnership. First, the other leader must show signs of integrity and a willingness to follow through on verbal commitments. Even if you have no history of working with the person, pay close attention to current behaviors. Missed meetings, unreturned calls, a lack of transparency and the absence of timely information would interfere with trust. Secondly, ask if you and the leader can create a joint effort based on equality and good faith. These are related, of course, but the differences are important. For example, someone who has shown good character over time still may not be able to join you in embracing the process, possibly because he or she prefers to work alone and guard information. Ultimately, this question rests on intuition and a leap of faith.

VIEWPOINT: IN MY EXPERIENCE

For those who enjoy this Q & A section, here are three more questions I receive regularly:

Q. Should board members sign confidentiality agreements before a partnership exploration begins?

A. The answer to this common question depends on each board's traditions and how much authority has been granted to its representatives on the joint steering committee. Since the CEOs typically sign confidentiality agreements, some boards believe that includes them as well. Some boards want the steering committee members to sign, as an extra precaution. My preference is for the entire board to sign an agreement, together in real time, as a reminder and symbol of the seriousness of the partnership exploration. Then the steering committee members sign again as a group, as do the facilitator and administrative support staff members.

Q. A merger is a business transaction -- why are we talking about this other stuff?

A. A human services merger is **not** primarily a business transaction. While the work rests on many business-driven practices, the combination represents a creative mix of missions and cultures, including programs and services, donors, stakeholders, staff, volunteers and customs. In my experience, what matters most is how participants feel, and this cannot be analyzed or replaced by commercial practices.

Q. Why don't you include names with your testimonials?

A. I wish I could! The confidential nature of my work prevents me from sharing who said what. If I worked on a project that did not result in a new partnership announcement, including a CEO's name might lead to questions about the potential merger partner's identity. And, if a limited number of agencies provide certain services, mentioning one leads to too much guessing. By eliminating names, I further project the privacy of my clients and this encourages candid input.

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

TALKING POINTS

"I haven't had a chance to tell you personally what a fantastic job you did. The buy in from our participants was obvious. Since then everyone expressed positive reactions to our meeting ... this is helping others to stretch, in a much needed and appreciated way."
-- Vice President, large human services organization

"Once again, a fantastic read! Thanks for sharing these valuable insights."
-- Executive Director, state organization

"You have taught me well on how to be collaborative! I often channel my inner Marta."
-- Vice President, behavioral health nonprofit

End Point

This fall is busy with three presentations and six projects, most partnership-related. These include two formal merger explorations, with another on the short horizon. Like some of you, I need to remind myself to pick up a great book, play with the dog or connect with a friend. Enjoy autumn, in all its color and glory. And . . . may you be fizzy with collaboration.

Best wishes,

Marita

PARTNER SERVICES SPOTLIGHT

I know people! Please let me know if you need expertise to enhance your organization's efforts. My circle of independent senior consultants can respond quickly to offer a wide range of services, including the following:

Community Input and Analysis

- Design and implementation of community input process
- Identification of community-based opportunities
- Qualitative, quantitative, and behavioral research to help nonprofits build upon strengths
- Applied research to capture outcomes and demonstrate impact
- Program evaluation planning and data analysis and reporting
- Survey design and analysis
- Focus group facilitation and in-depth interviews
- Experience in applied health data management
- Development of outcomes and action-based implementation plan
- Best practices research and strategies
- Effective tactics to address stakeholder concerns
- Facilitative leadership to create community and build agreement
- Impact measurement
- Cause storytelling
- Market analysis and evaluation

Please let me know if you would like additional information about this dynamic group of consultants. Many services are featured on my website, but they grow by the month.

WORKSHOP REMINDER

Marta's popular Project Management Basics workshop will be offered this month. This workshop receives consistently high marks from participants.

Project Management Basics
September 19, 2017
9:00 a.m. - 12:00 p.m. at Interact for Health
3805 Edwards Road, Suite 500
Cincinnati, OH 45209

Course Outline

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.

TOUCH POINT: CLIENT SPOTLIGHT

Family Nurturing Center is dedicated to ending the cycle of child abuse by promoting individual well-being and healthy family relationships. With locations in Florence, Kentucky and Cincinnati, Ohio, Family Nurturing Center offers a range of free, trauma responsive services to meet the needs of children and families. Each year they serve more than 30,000 children and parents through a continuum of education, prevention and treatment programs.

Current services include: individual, family and group counseling services for victims of abuse and their family members; individual and group counseling services for adult survivors of abuse; family-based parenting classes and individual parent coaching sessions; school-based child abuse education and prevention services; adult based child sexual abuse education and prevention services; facilitated visitation services for families in the child welfare system; and, community education and training services.

Family Nurturing Center provides evidence based interventions including Trauma Focused Cognitive Behavior Therapy, Combined Parent Child Cognitive Behavior Therapy, Parent Child Interaction Therapy and Child Adult Relationship Enhancement. All services utilize the core components of the Nurturing Parenting Philosophy, the Strengthening Families Framework, Motivational Interviewing and Trauma Informed Care to ensure the greatest opportunity for success.

For more information, please visit our website or call 859-525-3200.

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