



# Marta Brockmeyer, Ph.D. Project Pointers

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A few years ago, a client told me that she always thought consultants had lots of free time and total control over their schedules - until she met me. I still chuckle when I remember that fun conversation that ended with her saying, "I finally realized that it's all the same stuff."

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And indeed it **is**, no matter what our roles. We are all working in an environment of constant change and sustainability concerns. As such, collaborative efforts become even more essential in ensuring service delivery in the years ahead. One measure of this trend was the large number of calls I received this summer from organizations that were interested in approaching potential partners. This issue of Project Pointers will address some of the key communication questions that arise early in the process.

## Starting the Partnership Conversation

### What do you want?

As discussed in previous newsletters, the partnership continuum ranges from cooperation through full corporate integration. This array of choices can make goal setting difficult. Try to narrow your choices to one or two options, and then think about what each choice would require. For example, if you are considering both administrative consolidation and a merger, discuss the advantages of each with your executive committee and other key stakeholders. As you gather input, transform your lists into concise reasons for pursuing either option.

At this point, you are ready to create communication goals for discussions with a partner. Your key messages will flow from these clusters. For example, if you listed both increased golf outing attendance and the submission of three more grant applications, your communication goal might be to increase revenue. If you want to offer

more staff training and improve the employee evaluation process, your goal might be staff development. These goals must be clear and logical before you can influence a partner. Simply, are you sure you know what you want?

### **What do you consider?**

First, try to assess whether the target agency views you as a competitor. If it does, then list the kinds of messages you can deliver to alleviate some of that concern. If you can frame things as a way to join forces and increase strength, try to do that. Next, think about the ways your nonprofit might enhance the services of the other organization. You may be focused on what you need from them, but try to learn what they need as well. The conversation should then naturally shift to ways you can offer more together and feel good about improvements for both agencies. Definitely avoid approaching them by asking what they can do for you.

### **What do you say first?**

Your words and approach depend on your audience. In most cases, you will first be talking with another executive director. If the two of you have already casually discussed the idea of partnering, you are now ready to articulate the goals you developed. Your talking points will guide the discussion.

If you have not yet talked to the potential partner, an informal meeting over coffee or lunch is ideal. You may choose to initially talk more generally about partnering, and then share your specific goals at a second meeting. While general brainstorming can be helpful, I suggest that you state upfront the advantages you see in a partnership and be as forthcoming as possible -- this is not a time for vague language.

Of course, you will have shared your ideas with your board chair all along. After you feel you and the other CEO are aligned, the two of you are probably ready to meet with both board chairs. The four of you may talk in more detail about possibly joining efforts and then outline next steps. Ideally, each of you will share perceptions with your respective boards and get their support. The boards may begin to develop their deal breakers at this point, and a formal vote to explore a partnership follows shortly thereafter.

### **Can you resist temptation?**

An effective partnership exploration requires a thoughtful, proactive process. It is tempting to react quickly when we are busy and distracted, but this can lead to major communication problems. Simply, stop and think before making a statement that may change the course of the process. It is also tempting to get caught up in the flattering attentions of another nonprofit and move too far down the planning line before engaging your board. A formal partnership discussion should never be initiated without the board's blessing, and the chair should be involved early and often.

Another communication caution relates to secrets. While boundaries and confidences must be respected, deliberately withholding key information during a partnership discussion is a predictor of failure. For example, you might want to understate your organization's financial shortcomings until the last of a series of meetings, but this type of restraint will be resented. Finally, it is important that you share news of the exploration appropriately. It is usually best to communicate on a "need to know basis" and limit the number of people who know early in the process.

### **Are the stars lined up?**

Once you have created your messages and started the conversation with your identified partner, take another big picture look at the planning environment. Your history of partnering in general will inform this new exploration. If you have already worked with the other organization, you will know if your communication style syncs with that of the other CEO. And, you will know if the other agency truly values communication. If their website is poorly designed and the newsletters are sloppy, the lack of standards will subtly impact how you work together. Also, what are the funders communicating about combinations in general and yours in particular? If you are receiving cryptic comments and sense a lack of support from funders, success is less likely.

Finally, don't wait too long. A partnership exploration rests on straight communication and shared information, but it is impossible to analyze the entire universe of data. If you wait too long and continue to study, hoping to learn everything, your opportunity may be lost. Ultimately, the conversations lead to a leap of faith.

Best wishes,

A handwritten signature in black ink, appearing to read "Martha".

## **Workshop Announcement**

### **Project Management Basics**

**Marta's popular Project Management Basics workshop will be offered on Tuesday, September 16th from 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](#)  
Project Management Basics will be offered again in 2015!  
February 26, 2015  
September 22, 2015  
9:00 a.m. - 12:00 p.m.  
Please check the Interact for Health website early next year for registration details**

## **Client Spotlight**

### **Cincinnati Association for the Blind and Visually Impaired (CABVI)**

**Most of you are familiar with CABVI, as they have been helping people who have severe vision loss enjoy independent lives for more than 100 years. But you may not know their wide array of services and operations. These include full vision rehabilitation services, counseling, information services (including Radio Reading), and employment services in a variety of occupations, including light manufacturing, office/contact centers, retail and government contract management services.**

**The organization's most recent change to further its mission in Greater Cincinnati is a Joint Services Construct (JSC) established between CABVI and the Clovernook Center for the Blind and Visually Impaired. After more than six years of a growing partnership between these two agencies, both boards agreed to transition the following to CABVI: Access Technology Training (use of computers, tablets and smart phones), Orientation and Mobility Instruction (independent travel through use of a white cane), Social Services and Vision Rehabilitation Therapy (independent living and work skills). This JSC agreement followed the 2013 collaborative planning and agreement to transition all low vision services to CABVI.**

**CABVI is now the sole not-for-profit Community Based Rehabilitation service provider in Greater Cincinnati. Having served over 5,000 individuals in 2013, CABVI is now positioned to achieve its vision of *"Excelling at fulfilling and responding to community needs by being the principal source and resource for people who are blind and visually impaired."***

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