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As the year begins, several colleagues are making career changes. So often, seemingly unrelated jobs provide the unique combination of experiences required for a particular role. At this point in life, I understand how all of my assignments prepared me to facilitate mergers and other partnerships.

My most instructive job fell between college and graduate school when I was the receptionist in a large prosecuting attorney's office. Within a five minute period, while handling multiple phone calls, I could be found greeting and directing a wide range of visitors. I learned more about consulting from that job than any other during the decades that followed. One significant outcome was my deep respect and empathy for staff members who work tirelessly to balance the needs of internal and external stakeholders. I am always thinking about the impact of projects on individual staff members.

Staff members play an especially critical role in human services partnerships, particularly mergers. This issue of Project Pointers will address some of the issues related to employees and their involvement in the process.

What About the Staff?

During our initial conversations, leaders usually ask about the role of employees during a partnership exploration. The way an executive presents these questions offers clues about the culture. If the CEO is primarily concerned about insulating himself while developing the integration plan, employees will not be engaged enough to support

the final product. Worse, the executive director may not mention the staff at all. This is a huge red flag, guaranteed to derail a collaborative process. But if the leader's first questions relate to making employees feel secure during the planning, then effective, inclusive integration is more likely to flow. Involve them often and make the tasks meaningful.

Timing is key.

Deciding when to share information about a potential merger is one of the most important decisions the leaders will make, and it profoundly impacts the staff. Hopefully, the decision is made in the context of a good communication plan. Key administrative staff will be needed to assist with the negotiations phase of the exploration. For example, it would not make sense to attempt a due diligence review without the support of the finance and HR professionals. So those folks are "in" from day one.

Some agencies conduct joint leadership meetings for months before the boards authorize a formal exploration process. During this phase, organizations may approach information sharing differently. Some choose to keep the discussions a secret and everyone signs a confidentiality agreement. Leaders choose this approach for several reasons, including the desire to lessen staff stress and possible resignations. They also want to guard against competitors using news of a potential merger for their own gain. And, concerns about alienating donors may drive privacy. Simply, leaders decide that the word should not get out.

At the other end of the spectrum is the decision to inform the entire staff that discussions between the two agencies are underway. This removes the confidentiality challenge and is transparent. Some leaders feel that ambiguous information is more humane than no information, and that the staff will feel better having received some communication.

There is no right or wrong way to approach this, but groups that delay sharing news of the process tend to experience more control and staff trust during integration. If the work remains confidential, then the more challenging question may be how many levels down on the org chart you can go before security is breached. It can be stressful for the entire board and leadership team to remain silent about the largest issue in the organization, another reason the disclosure decision is complicated.

Will they leave?

Yes, a few employees may choose to leave. Some people dislike change of any kind and do not want to experience it on such a big scale. In rare cases, a collective sigh of relief will be heard when a poorly performing employee exits (they often know they cannot meet the standards of the merged entity). While CEO or staff performance issues should never drive a partnership exploration, a timely resignation may in fact be helpful to everyone involved.

Most staff members are excited about the new opportunities and want to support integration. They believe clients will benefit, but also look forward to new professional development opportunities for themselves. I have not experienced a process that resulted in wholesale layoffs, contrary to what staff may initially fear. With the combination of agencies, usually some employees are promoted. And because a merger typically results in expanded services, additional staff may be hired, not fired. Communication is key in encouraging employees to remain.

What they bring.

Everyday, the staff breathes life into the organization's mission through concrete tasks. As such, they are in the unique position of knowing what works best and what does not. With hundreds of years of collective expertise spread across the organization, their input is absolutely essential for making partnership goals a reality. Some may have dreamed of implementing new strategies in the past, but the skill sets or other resources were missing. Now, the partnership may provide an opportunity to create something new that helps clients and promotes sustainability. Psychic energy comes into play here also - it can be energizing to work with new people and brainstorm.

The staff will also think of hundreds of details that might not occur to a member of the executive team. Certainly, employees and volunteers need the vision and planning that the executive team and board provide. But, it's easy for a CEO to overlook the suggestions of a child care support person simply because the employee does not have a "planning" job title. The more involved they are in the process, the more the staff will surprise you with their creativity and intellect.

They also provide support to each other. Whether you form an official staff relations committee or allow informal networks to thrive, employees need a vehicle for expressing their feelings. They may feel a loss of control or occasional frustration about any number of things, resulting in passive aggressive behavior or outright resistance. But

employees also celebrate the positive changes that are underway. If they are encouraged to talk to each other and collectively work through integration issues, stress will be reduced.

How they contribute.

Employees obviously support the partnership by continuing to perform their job duties during a season of change. Some days, this is a challenge and should not be taken for granted. But there are merger-specific roles many of them play. A small group may serve as advisors to the leadership team on matters that particularly impact staff. Or, they may help plan integration brainstorming sessions or celebrations. Some work with the merger consultant to fine tune staff survey and focus group questions, then recommend changes that reflect the data analysis. Others conduct research to pinpoint best practice trends or establish new programs. There are as many ways to tap into their talents as there are people in the combined new organization.

Key staff will chair or serve on various workgroups that are formed during the integration process. These "hands on" people have the content knowledge and experience to make sensible process recommendations to the leaders. They also serve as invaluable ambassadors because their colleagues see their enthusiasm. Highly valued, long term employees are particularly effective role models for younger staff.

Organizations that respect and develop their employees are much more likely to complete an effective merger process. If you are fortunate enough to experience one, the rewards for clients and staff are beyond measure.

My best for the new year,

A handwritten signature in black ink that reads "Musta".

Workshop Announcement Project Management Basics

Stress Reduction for the New Year!

Marta will be offering two sessions on Project Management Basics at Interact for Health. This workshop receives consistently high marks from participants.

**Project Management Basics will be offered on
Thursday, February 26th 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](#)
Registration deadline: February 19th
Project Management Basics will be offered again on
Tuesday, September 22nd
9:00 a.m. - 12:00 p.m.
Please check the Interact for Health website
for registration details.**

Client Spotlight Bethany House Services

Since its founding in 1984, Bethany House Services (BHS) has always evolved to meet the changing needs of families experiencing the crisis of homelessness. However, on January 1, 2015 they embarked on the biggest change in their 30 year history - they more than tripled the number of homeless shelter beds for families when they assumed responsibility for 77 shelter beds previously operated by Mercy Health - St. John.

The organization has sheltered homeless families since 1984 and operated 29 beds in its South Fairmont emergency shelter since 1986. As BHS increases capacity from 29 to 106 beds, they project that the annual number of sheltered clients will increase from 440 in 2014 to 1300 in 2015, 865 estimated to be children.

Bethany House Services is a highly-ranked leader in family sheltering, transitional housing for homeless families, post shelter support, rapid-re-housing, and permanent affordable housing. As such, they are well-equipped to assume the additional 77 beds. As the need for services for homeless families in Greater Cincinnati steadily grows, BHS is committed to moving these families from homelessness to housing, independence and self-sufficiency.

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