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Project Pointers

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POISED FOR PARTNERSHIP

I recently enjoyed speaking to a graduate class in nonprofit management. The instructor, a nonprofit executive director, asked me to talk about nonprofit collaborations and mergers, a topic near to my heart. When the class started, I learned that every student in the room came from the corporate world, none were board members, and most stated they knew little about nonprofits. So, while I eventually discussed collaborations and some of my experiences, I decided to take advantage of the captive audience and begin with nonprofit trends and regional initiatives. I talked quite a bit about the demands the world places on human services executives and how difficult and confusing the current climate is. Several students said they just had not considered what it takes to run a nonprofit.

Beyond formal education, effective leaders never stop learning. I hear colleagues discuss the content knowledge and skills needed to sustain organizations, with process skills being high on most lists. And, one of the shared tenants of sound leadership is the necessity and value of planning. This edition of the newsletter focuses on a special type of planning: integration following a decision to restructure.

TURNING POINT

Successful Integration - Five Initial Actions

As anyone who has gone through a formal collaboration or merger exploration knows, the process can be exacting and long. But the exploration phase leading to the boards' approval is relatively straightforward compared to the actual work of bringing two or more organizations together. The wide range of planning topics and related decisions can be overwhelming across months of work. One way to reduce stress during this initial period is to take five critical actions:

1. **Document the plan.**

   This may seem obvious, but some groups attempt integration in the absence of a group design process. The integration planning process should start before the decision to merge has been made. Ideally, the people who have primary responsibility for combining the agencies will work together to capture the work flow in a clear, comprehensive document. This version of the plan will change over time, of course, as steps are monitored and evaluated. Several clients have told me that a robust written plan was key to their integration success.

2. **Clarify processes.**

The plan's execution requires clear, logical internal processes. Even if a topic or task appears in the plan, the way to address it may not be understood by all parties. For example, if an integration workgroup believes that one of its topics should fall under the umbrella of another workgroup, what is the process for transferring that topic to the other group? Changes like this are less confusing if a published process is followed; it is easy to lose control of the details when hundreds of tasks must be completed.

3. **Put someone in charge.**

Successful integration requires a dedicated leader whose primary, if not exclusive, responsibility is the combination of two or more nonprofits. The CEO of the combined organization fulfills this role in some cases, but few have the time to devote to this effort. It is far more likely that another internal leader or consultant will be charged with integration oversight. In addition to having good analytical skills, the integration head serves as coach, task master and counselor. So, personality and the ability to work well with others are essential characteristics. Once identified, the person must have the authority to make things happen and the executive director should explain the role to the staff. Conflicts typically arise when roles and responsibilities are undefined, never more so than during a merger.

4. **Involve the staff.**

The senior integration team, carefully selected to ensure a variety of styles and competencies, works closely with the integration leader. Together, they focus on policy issues as well as programmatic and administrative issues. And, with the CEO, they deliver the initial cues about the evolving new culture.

But implementing change through practical solutions and best practices comes from the staff. When employees from both organizations begin to know each other, learn who does what, and discuss ways to create even better services, culture building begins. From my experience, there is no substitute for staff members sitting down and learning from each other. And, this needs to begin immediately. Typically, a few staff members begin working together before formal integration begins, then they are able to model collegiality and inclusiveness for others. Even it if is impractical for each person to serve on an integration committee, everyone should be offered the opportunity to participate in meetings or to give online suggestions.

5. **Decide what can wait.**

One of the main challenges of integration is discerning which tasks receive your attention when so many others compete. Most of the regular work of the nonprofit will not stop because your board voted to approve a partnership. Can anything wait a few weeks or months? If you and your staff are already at capacity and cannot hire additional help, set priorities vigorously. In addition to reducing stress and illness, the quality of your work will improve. When possible, consider delaying new initiatives and even some recurring ones.

Taken together, these five initial steps set the stage for success. Granted, many decisions will be required on any day during integration, but a good foundation will create space for dealing with the unexpected.

VIEWPOINT: IN MY EXPERIENCE

I routinely receive many of the same questions - here are three of them:

Q. May I talk to more than one potential partner at a time?

A. This depends on where you are in the process. If you are making initial inquiries to help establish selection criteria, having multiple conversations is helpful and understandable to others. But as your list narrows, you should tell each organization how many others are under consideration. Clarify your timelines and the types of information you need. Once you select your preferred partner and have communicated the decision, other options should not be considered. If you and the other organization move forward to explore a formal partnership, the relationship must be exclusive.

Q. Our new team is composed of people who already have history - now what?

A. This is a common occurrence, especially when turnover is low. When people have worked in the same organization for several years, they naturally assume a new team will replicate past behaviors and group processes. To counter this typically unconscious assumption, establish the group's purpose, limitations and norms at the outset. Keep bringing the group back to its charge and focus on the actual tasks at hand. If old patterns or conflicts emerge, remind them that this group agreed to operate differently. Of course, if conflict continues between two team members, talk with them separately and repeat the "new team" message.

Q. Should support for integration be a factor in staff evaluations?

A. Absolutely! Long before the boards vote to approve a formal partnership review your organization's employee performance evaluation documents. Hopefully a category already exists for measuring how well someone is supporting new initiatives. If your current system does not include such a category, add one and explain it before staff members present their annual goals. The new evaluation category allows you to support under-performing staff members and reward those who have exceeded your expectations. In a few cases, the review process leads someone to recognize their lack of commitment and resign.

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

TALKING POINTS

"Marta, I am so glad that we are working with you on this project! Your sensitivity and desire to get this right for all parties is appreciated. I agree with the approach you are taking"
- Nonprofit CEO and Merger Steering Committee member

"Thanks for all of your fantastic work guiding us through these merger talks."
- Board chair

"Marta, thank you for speaking before my class Monday evening. You were excellent!!!"
- Graduate instructor

"The staff session far exceeded my expectations."
- CEO, behavioral health organization

End Point

This summer I will have surpassed forty partnership projects. Like most lifelong learners, I wish I could revisit earlier projects and apply what I now know. Absent that choice, we all can channel our experiences into improved strategies for work. It's hard to beat the application of intuition, heart and a good plan!

My best for an energizing spring,

Marta

WORKSHOP REMINDER

Marta's popular Project Management Basics workshop will be offered in September (registration opens May 1, 2017). 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

Welcome House of Northern Kentucky

In 1982. a coalition of churches founded Welcome House of Northern Kentucky and committed to support it financially and through volunteer efforts. During this period, homelessness of single parent families, usually headed by women, skyrocketed. The organization recognized the need for a women and children's shelter and opened the Welcome House Shelter in 1983. As further needs arose in the community, Welcome House responded.

Today, the mission of Welcome House is to end homelessness, and its vision is to be a leader in guiding clients from housing uncertainty to housing stability. The organization accomplishes this through a continuum of services that addresses the variety of needs of those living in poverty or at-risk homelessness. Over the decades, due to the critical need of affordable housing in the community, Welcome House began focusing more on housing development and now has three service areas offered at four locations in Covington. Services and 2016 statistics follow:

- Service Coordination, covering assessment, outreach, case planning, financial education/budgeting, housing counseling, employment services and community referrals. (584 adults and 228 children)

- Income & Benefits Service, including the Representative Payee Program and the Social Security Outreach Program. (186 individuals)

- Housing Services, including the Emergency Shelter (275 individuals), the Gardens at Greenup Apartments (32 households), King's Crossing (11 households), rental assistance (129 individuals) and scattered site low income housing (94 units).

Linda Young, the revered leader of Welcome House, will retire this summer. Her legacy will continue through the organization's continuing focus on advocacy and support for our most vulnerable populations.

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