



Marta Brockmeyer, Ph.D. Project Pointers

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POISED FOR PARTNERSHIP



I just finished reading The Accidental President, A.J. Baime's intriguing book about President Harry Truman's first four months in office. Of course, my growing up in Missouri included many tales about Harry. But I was struck by the parallels between Truman's path and those of my good nonprofit colleagues. Many of you became an "accidental" leader during difficult times and may not have sought your position. You may also have felt lonely and uncertain during the transition process to your new role. Whether you are still in this starting phase or have evolved into a seasoned leader, the book offers a positive reminder of the value of trying to quietly do the right thing on any given, challenging day. Like most of you do, every day!

And one of your current or future challenges may relate to sustainability and partnerships. Is your organization ready to explore a partnership as a sustainability option? If you have one in mind, how likely is it that you can quickly respond to the opportunity while maintaining the focus that your current commitments require? And, do you really know what you have to offer another nonprofit? An objective review or fresh perspective can help. Please remember I am always happy to talk about current or potential partnerships, and there is no cost for an initial, confidential consultation.

TURNING POINT



Things Didn't Go as Expected. Now What?

Most nonprofit leaders approach a partnership exploration with hope and optimism. After the boards approve the process and the executive directors meet a few times, a joint steering committee is formed to advance the cause. The committee works with both directors and a facilitator over the course of months, with every expectation that the partnership goals will be met. However, despite good planning and a focus on improved client services, groups do not always land where they expected. We naturally ask what we could have done differently or if the exploration was a bad idea in the first place. In most cases, the decision against executing a partnership results from unpredictable factors, not because someone made a misstep. If your nonprofit experiences this disappointing outcome, consider the following for the future:

Criteria. A dedicated, structured meeting to clarify organizational goals makes partner selection easier and more strategic. Ideally, each board established partnership criteria before this particular exploration began. If not, then a frustrating process may follow. If you and the other organization are not each clear on what you are seeking, it will be harder to move forward. Criteria might include such things as geography, financial stability, the value of staff development and certification status. I strongly encourage your boards to set these standards before spending precious energy, time and money on the wrong process.

Plan B. You may not have secured the partnership option you expected, but what have you learned and what can you do with the other organization? You may now understand the other nonprofit's programs well enough to consider joint programming. You may have been so impressed with your partner's financial acumen that you enter into a contract for administrative services. Or, you may consider joint fundraising to launch a new learning collaborative.

A partnership exploration is a bit like the accreditation process. Nonprofit leaders almost always emerge from these discussions feeling good about their organization and realizing in a different way what their true potential is. It is not unusual for the organization that was perceived to be weaker to actually evolve and become the stronger one, eclipsing their former partner.

Steering Committee. The selection of board members to serve on the committee is key to the project's success. Not only does the exploration require a range of board member skills and experiences, it requires a large time commitment. Even good board members may not be able to make this commitment on top of their regular board duties, and they should not be pressured to serve. At some level, these too busy people may rush the process. Sometimes, a person's professional expertise gets in the way of thinking clearly about the proposed combination. For example, a person with extensive corporate merger experience may not have the patience for a human services merger, which invariably takes far longer and focuses on culture and process more than a for-profit transaction. And, some board members can be so protective of their organization that it is difficult for them to negotiate with another one. Steering Committee members should be open minded, strategic, and willing to look past the current state of each organization to imagine the possibilities ahead.

Feelings. A decision against creating a partnership *does not mean you made a mistake*. Walking away is not necessarily a sign of organizational failure, nor does it mean you personally did not do a good job. What matters most in the end is the integrity of the process and how people feel when the exploration ends. Because in the end, no matter how much analysis and thought went into the exploration, what you will remember is how you felt.

There are many points along the way when someone may feel threatened, devalued, or simply confused. Complex issues can make it harder to not take things personally. I've seen a range of behaviors during these projects because leaders cannot always predict how they will feel and are often surprised by them. As an example, in three of my projects, executive directors decided at the last minute that they could not move into a secondary position within a combined organization. They were not able to articulate this until they went through the process, and the explorations stopped immediately when reality sank in.

Facilitator. Did you select the best person for this particular project? Did you learn about his or her previous experiences and did you interview thoroughly? Even within nonprofits, different consultants specialize by concentration and not all are ideal for all partnerships.

An incompetent facilitator can easily derail discussions. As you move through the process, do not hesitate to point out any concerns you have about performance and remember the person is supposed to be there to help you, not the other way around. If you are fortunate enough to enjoy the services of a skilled volunteer, their performance must also be evaluated.

The Great Unknown. You cannot possibly absorb the entire universe of information about another organization, especially before you agree to explore together. Most of my clients have been wonderful throughout our work together, and it has been a joy to share the exploration and integration of their nonprofits. But, things happen, and life takes over. Strange, unpredictable issues or behaviors pop up and we never know what's around the corner. Even with a solid process in place and seasoned participants, there may still be a devious Steering Committee member, an insecure CEO, or an unforeseen dynamic that has resulted from the unique mix of people and factors. Sometimes, "surprise" financial information just happens to emerge at the point of a board vote.

All to say... there will always be barriers, no matter how many partnerships you have explored. Great rewards often require risk at some level, so don't let fear of the unknown hold you hostage and keep you from exploring possibilities.

VIEWPOINT: IN MY EXPERIENCE



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

Q. Should the Steering Committee do strategic planning before asking the boards to approve a merger?

A. No, the new board of the combined entity is charged with the task of strategic planning and it should begin the process as soon as possible. But the Steering Committee typically discusses the benefits of a partnership and recommends some broad goals to both boards. While it is unusual for a new board to move in a different direction, it may. The board and Steering Committee usually work in concert, but the responsibility and authority for creating a new strategic plan lies with the new board.



Q. Can we use the same attorney?

A. This depends on the complexity of each organization and the specific questions related to assets. In my experience, most nonprofit partnerships that result in corporate integration, such as acquisition, use the same attorney to draft and file the official documents for the Secretary of State, etc. This works because an environment of trust and good faith exists by the time the boards vote, and the process is not considered to be adversarial. The nonprofits share the costs, another reason to use one if possible. In some cases, each organization needs or prefers to have its own attorney if a complicated transfer of assets or donor constraints are part of the conversation. And, of course, some boards and executive directors prefer having the security of their own legal review.

Q. Will people lose their jobs if we partner more formally?

A. A nonprofit cannot guarantee perpetual employment to anyone. The organization's goals may change, funding may change, and our world may change. A staff member's performance also influences continued employment. Given all these variables, it would be foolish to promise ongoing employment when questions about a partnership arise.

The truthful, more supportive response is to say that every attempt will be made to retain all employees and that nobody's pay will be lowered, but that actual duties may shift in a few cases. And, it may help to remind folks of the above environmental points. The reality is that even more work requirements will follow a combination because of the expanded scope and range of opportunities. Employees are usually energized and quickly dig in to support the partnership. Additional staff are often hired to keep up with demand. In some cases, salaries increase to the level of those in the other organization. At the same time, the combination may provide the perfect opportunity for an under-performing employee to voluntarily go elsewhere.

More Questions? Just ask and I'll include them (anonymously) in an upcoming newsletter.

TALKING POINTS



"Thank you from the bottom of my heart for the amazing work you have done guiding the Steering Committee and herding the cats!"

-- Executive Director, environmental nonprofit

"I appreciate your keen eye on things and your wise counsel to our Steering Committee members."

-- CEO, disabilities organization

"You should know how much I appreciate your talent, your values and your mentoring."

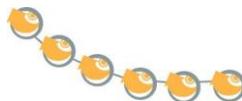
-- Vice President, human services organization

"I went to your Project Management class yesterday and it was fantastic! I learned a great deal and could not wait to get to working with my new tools."

-- Corporate Trainer, health-related nonprofit

End Point

As we move through the new year, most of us will encounter the unexpected and have moments of uncertainty. When these "accidental" moments arrive, try to remember that the surprises may quickly become the opportunities we needed.



Best wishes,

Marta



Looking for just the right resource? 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:

Transitional Leadership and Recruitment

- Succession planning, covering all components of senior leadership and staff searches
- Facilitation of board discussions to craft job descriptions
- Ongoing support to search committee, through on-boarding
- Board operational and leadership experience to stabilize an agency during a period of acute change
- General operational support for seamless mission delivery
- Service as interim executive director/CEO/president until a permanent leader is hired; continuation of activities until new leader is fully transitioned
- Interface with board, staff and key stakeholders during a period of transition so everyone understands the agency is moving forward and serving their base

If you would like additional information about this dynamic group of consultants, just ask. Many services are featured on my [website](#), but they expand regularly.

WORKSHOP REMINDER



Marta's popular Project Management Basics workshop will be offered in February, 2018. This workshop receives consistently high marks from participants.

Project Management Basics

February 6, 2018

9:00 a.m. - 12:00 p.m. at Interact for Health

3805 Edwards Road, Suite 500

Cincinnati, OH 45209

This workshop will be offered again on September 18, 2018

[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.



Big Brothers Big Sisters.

Something great just got bigger! Effective January 1st, Big Brothers Big Sisters of Greater Cincinnati expanded services to include Warren and Clinton Counties. Previously, these counties were served by Big Brothers Big Sisters of Warren and Clinton Counties. After working together for a year on a joint fund raiser, both agencies decided to consider options that would best serve our region's children and have combined staff and resources for even greater impact.

The organization's mission is to provide children facing adversity with strong and enduring, professionally supported one-to-one relationships that change their lives for the better, forever. The professional staff (32) work with parents and volunteers to help children become confident, competent and successful in school and in life. Of the 1,158 children served in 2017:

- 100% of the children are in school
- 99.83% of the children are substance-abuse free
- 99.49% of the children are not involved with the juvenile courts

The agency is located in the United Way of Greater Cincinnati building. Please visit their [website](#) for more information.



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[Marta Brockmeyer, Ph.D. | Marta@MartaBrockmeyer.com | http://martabrockmeyer.com](#)

Marta Brockmeyer, Ph.D., 553 East 4th Street, Newport, KY 41071

[SafeUnsubscribe™ karen.e.turner@atprofessionals.com](#)

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