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Project Pointers

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Practicing What I Preach

I spent most of the summer completing my own strategic planning process. And while the tasks were time-consuming and often intense, they led me to joyous conclusions. I am limiting my consulting practice to the **human service community**. And, I am narrowing my scope of services to **focus on planning and partnerships**. My services will now include:

- Strategic and implementation planning
- Partnership and merger facilitation, due diligence through integration
- Needs assessments, service delivery review
- Succession and governance planning
- Board and management team development
- Project management consultation

I also have identified fifteen excellent independent practitioners, all of whom offer complementary and essential services. As your organization's needs change, I look forward to referring these outstanding professionals.

I have been blessed with a wide range of clients and projects, all of them learning relationships. But I want to devote the balance of my career to supporting human services, my passion. My rewards come from working with those that serve our most vulnerable citizens - and this is how I've chosen to channel decades of experience.

If possible, my summer process resulted in even more empathy for you. I now know first-hand how difficult it is to do such serious planning while balancing a zillion work tasks each week. I also know, at a different level, how essential it is to keep the process simple, focused and fun. I hope you will join me in celebrating a new chapter.

Settling in After Summer

While nonprofit life moves quickly all year long, some projects are put on hold until the week following Labor Day. Committees and regular collaborative groups may also take a break during the summer. Simply put, scheduling is easier and people seem better able to focus when kids are back in school and most vacations are over. So, it's a good time to remind ourselves of guidelines for successful committees.

First, must you meet? Or even have a committee? Take a deep breath and ask yourself if the committee may have outlived its usefulness. Or, perhaps the entire group no longer needs to attend. If you do send a meeting invitation, ask the participants to set the balance of the meeting dates as soon as possible. And send the agenda and any related materials early. If you do not have written statements of responsibility, draft ones that include clear role descriptions. A simple committee report form keeps members on track, serving as a quick snapshot of action and goals.

A New Look at Partnerships

I am working on my ninth strategic partnership project and have just received calls about three other possible mergers. Of course, I know the many benefits that flow from a well-planned due diligence process that results in a merger. These include diversified services, expanded funding opportunities and a deeper understanding of organizational strengths and weaknesses.

But an attempted merger is not a solution to all problems. In some cases, it is simply too late for a merger. For example, the process should not be used as a vehicle to oust an ineffective executive director. Nor is it appropriate if one organization wants to overcome a disastrous public relations history related to undue donor influence.

Before considering a formal partnership, take a seriously honest look at what motivates you. The first issue is not what you need from a partner, but rather what strengths you bring to share with another organization. A merger should not be seen as a way to save a deeply troubled agency, but rather as an exciting mix of two strong organizations. Open hearts and clear minds are required.

The next edition of Project Pointers begins a series on succession planning. I would love to hear about your experiences in the meantime.

Wishing you rich autumn days,



Workshop Announcements

Project Management Workshop

Marta's popular *Successful Project Management* workshop will be offered on

Thursday, December 9, 2010 - 9:30 a.m. - 12:30 p.m.

at The Health Foundation of Greater Cincinnati

3805 Edwards Road, Suite 500, Cincinnati, OH 45209

Register online at: [Workshop Registration](#)

The *Successful Project Management* Workshop

will also be offered on April 5 and December 8, 2011.

Registration for these workshops will begin in January, 2011.

Nuts, Bolts, and Tips

Are you spending too much time looking at stacks of paper? To minimize paper handling and facilitate thinking, ask yourself:

1. Do I really need to keep it?
2. Where should I keep it?
3. For how long should I keep it?
4. How can I find it?

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