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Late summer brings an exciting mix of activities and thoughts as I balance new merger explorations with other client projects. I am also learning an exciting new strategic planning model and will facilitate the first planning session next month. Simply, things are fast, complex, fun -- normal!

I am frequently involved in "what if?" conversations with leaders who are contemplating mergers. But when two clients asked about corporate partnerships during the same week, it seemed like an interesting topic for this newsletter issue. As we know, corporate ambassadors can help promote your mission, increase brand recognition, and offer a wealth of support for staff and volunteers. A few key points are outlined below.

Growing Corporate Partnerships

1. Clarify your needs.

If you are considering a corporate partnership, think about your expectations and the specifics of your requests. You may hope to gain an immediate, one-time gift for a specific initiative or you may hope for introductions and incremental gifts over time. In some cases, the primary benefit of a new relationship may not be dollars. If your highest needs are political or symbolic, you may seek relationships that connect you to the community in new ways. Understanding your nonprofit's goals is essential as you begin this process.

2. Select the best programs.

This step requires a grasp of what it costs to support each program or service. Assuming you know these figures, review the budget across programs and identify those that would particularly benefit from external support. During this review, you may quickly eliminate programs that are not ideal candidates for a partnership. For example, a program may offer value to clients, but may not provide strong public relations value for a company sponsorship. When you have selected the best programs, then discuss the types of additional services you would like to offer. Your wish list for new programs may appeal to a particular type of company, so this could be the right time to explore your dream.

3. Define partnership for each program.

This step may be tricky because programs differ greatly and tap into unique emotions and selling points for anyone looking at the organization. A solid understanding of what your organization can offer a partner should include a discussion of what the word 'partner' means in each situation. Identify the corporate qualities that would enhance a great partnership, then discuss how to evaluate the effectiveness of the potential union. Also, it may be helpful to define success -- there are probably as many visions of success as there are people sitting around the table. A common understanding will be helpful before you consider more public conversations.

4. Create selection criteria.

With your target programs in mind, begin to develop the partnership selection criteria for each one. Individual programs usually require specific selection guidelines, even if many criteria are the same across all services. Then develop the process you will use to select partners, including how many potential names you want to consider for each program. If you are seeking more than one partner per program, be sure the potential new relationship between the companies offers a compelling business case for each.

5. Determine the length of the commitment.

The optimum length of the formal partnership depends on your needs. If you are hoping for a "long-term commitment," what exactly does that mean to your organization? Your proposed start and end dates may influence which potential partners will show interest. Again, the time may vary by program. A potential business partner will want to hear a realistic time frame before making a commitment. It is also important to build in points at which all parties will review how things are working.

6. Research potential partners.

Unless you already have a list of interested companies, research will be the next step. Try to view your nonprofit as a possible partner might, then work with your staff to identify program qualities that would attract specific organizations. What might motivate a business to support your services? Learning which businesses typically contribute to missions similar to yours is a good start, but then think more creatively about how a company's products might align with the work you do. Try to locate concrete evidence of a corporation's values in action -- and how they mesh with yours. For example, if a company promotes itself as being friendly to the environment, measure their activities against your clients' programs related to the environment.

7. Select companies for initial discussions.

When the research is completed, set a realistic target number of companies for further discussion. Then decide who needs to be involved in discussions. In some cases, the CEO may not be the best person for initial conversations. If the list of potential partners does not include specific contact names, board members may be helpful in arranging meetings. At this point, review the selection criteria again to make sure they make sense in the context of the "short list" of targeted corporations.

If they do seem likely, then try to jot down selling points for each company. What might interest them enough to have a conversation about working together? This step is largely intuitive, but it will rest on your research and experience. Finally, be prepared to communicate steps in the process including suggested timelines for everyone involved.

8. Evaluate and select.

Moving beyond the company research, all of your potential partners must be interviewed or at least participate in a meaningful conversation. The actual conversations may be formal or informal, depending on culture and situation. If you have identified several possible companies for a program, then the questions should be structured. You also will want to use a fair, simple evaluation process. The more people involved in the interviews, the stronger the need for a consistent evaluation tool. One easy approach is to assign weighted numbers to the selection criteria you established in step 4. Comparing numerical scores is a good way to begin evaluation, but nothing replaces feelings and intuition. If a partner feels right to your team, it probably *is* a good choice.

9. Craft the agreement.

At the same time you are assessing the businesses, they are evaluating you. Once you all have reached an agreement on how they will support your nonprofit, documentation begins. This will be a series of conversations and agreements in most cases. But you will now put words to paper and detail the specifics related to the financial terms, administrative support, time frames, etc. I encourage you to also reach a clear understanding of decision making, especially who can veto what. An implementation plan will be helpful in heading off possible future misunderstandings.

10. Create the marketing plan.

You're ready to roll . . . but are you? Hopefully, you and your partner have reached a level of excitement that produces a creative path for promotion. The initial announcement of the new relationship is key in setting the tone for collaboration. One issue, of course, is how to distinguish this new effort from more general, ongoing marketing for your organization. And, be clear about who has primary responsibility for which pieces. Feelings of good will can occasionally dissolve during the nuts and bolts of implementation. So a structured approach to the above steps can provide comfort and effectiveness.

The next edition of Project Pointers will address another aspect of solid partnerships. I hope your late summer days bring a nice mix of restful and productive moments.

Best wishes,



Client Spotlight

It has been an honor to work with the following organizations:

St. Joseph Orphanage

Bob Wehr, Executive Director, is one of our most collaborative, effective agency heads. St. Joseph Orphanage was recently featured in the [Cincinnati Enquirer](#) around a series of articles on the Hamilton County Mental Health Levy, which is on the ballot in November. The article focused on their most intensive and restrictive service, the Crisis Stabilization Unit, which has literally saved the lives of so many children and teens since it opened in 1995. In the next year, St. Joe's

opened a Psychiatric Medication Management Clinic in Fairfield, a central location for Hamilton and Butler counties. In the coming year, St. Joseph Orphanage intends to become a behavioral Health Home, a new concept that has been championed by the Ohio Department of Mental Health. This model aims for better coordination between behavioral health care and physical health care, more preventive services, and better health outcomes. On an average day, St. Joe's currently serves over 1,000 active clients between the ages of 0-22 years of age. For more information, check out their website www.stjoekids.org or call 513-741-3100.

Pro Seniors, Inc.

Under the expert leadership of Rhonda Moore, Pro Seniors takes a comprehensive approach to helping seniors solve their legal and long-term care problems. The agency's Legal Hotline serves the entire state of Ohio and provides legal assistance to over 6,000 seniors a year. Issues include Medicaid, Medicare, Social Security, consumer debt, and home foreclosure. Most of these older adults would not otherwise be able to access any legal help. The Pension Rights Project helped obtain over \$3,800,000 in pension and retirement benefits for seniors in 2011. The long-term care ombudsmen are dedicated, client-focused advocates for residents of long-term care facilities. Pro Seniors is also ably assisted by over 100 volunteers, many of whom are part of the Senior Medicare Patrol, a federally-funded project to train seniors to educate their peers about health care fraud.

Workshop Announcements

Project Management Workshop

Marta's popular Successful Project Management workshop will be offered on the following dates:

Tuesday, December 4, 2012 - 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](#)

2013 Successful Project Management Workshop dates:

Thursday, March 21, 2013 from 9:00 a.m. - 12:00 p.m.
and Tuesday, September 24, 2013 from 9:00 a.m. - 12:00 p.m.

Online registration for 2013 workshops will begin in December 2012.

Federal Grants: Ready, Set, Go!

**Thursday, February 28, 2013 - 9:00 a.m. to 3:30 p.m.
at The Health Foundation of Greater Cincinnati
3805 Edwards Road, Suite 500, Cincinnati, OH 45209**

As part of the day-long workshop, Marta will address organizational readiness and three other presenters will deliver solid content related to securing federal grants.

This workshop will benefit decision-makers from small and mid-sized nonprofits who are considering or preparing for federal grants. Both CEOs and development staff will learn new ways to approach and secure federal grants - attending as a team will improve opportunities.

Online registration for 2013 workshops will begin in December 2012.

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