



# Marta Brockmeyer, Ph.D. Project Pointers

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[Website](#) [Clients](#) [Projects](#) [Bio & Values](#) [Testimonials](#) [Partners](#) [Training](#) [Contact](#)

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## POISED FOR PARTNERSHIP



I just returned from a wonderful weekend with an old friend. We moved to different cities many years ago, but the separation has never impacted the quality of our friendship. And while both of us have a large circle of newer friends, we are committed to nurturing our long term friendship. During the flight home, I thought about the importance of also nurturing our professional partnerships, the topic of this newsletter.

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## TURNING POINT



### Tending to Current Partnerships

Colleagues regularly ask about ways to explore new partnerships, a topic that will continue to be critical for sustainability. But, let's not forget the relationships we already have. We know of new collaborations that were created, ignored, and then quickly spun out of control without attention or follow up. In many cases, nurturing existing partnerships can be more rewarding than finding new ones. If a current partnership is faltering or you have simply not thought about it lately, now is always a good time to review the basics.

**Purpose.** Hopefully, participants agreed on the group's purpose and created a vision statement during its infancy. Over time, the purpose may have changed because of leadership transitions or external forces. An annual review of the purpose statement encourages team work and may clarify areas of conflict or confusion. If one was not created, it's never too late. Depending on the scope of the partnership, each board should renew its commitment to the goals as well.

**Process.** No matter how worthy its goals, a partnership will fail without a shared understanding of the process required to complete the work. Ideally, the same person will lead meetings, guide the planning, and monitor progress. In the absence of a dedicated facilitator, the group should agree on the rotation for facilitation, meeting guidelines, and any reporting requirements. It is important to regularly review procedures and assumptions about how things will be done, a practice that can reduce stress for all partners. Shared authority complicates decision making, but a regular review of process points will help preserve your relationship.

**Communication.** This topic flows through every project, large or small. Communication before and during any partnership initiative is especially challenging because of the number of people involved. As soon as the group has created its purpose statement and organized its work, a communication plan should be developed for agency and community messages. The key is frequency, so both internal and external audiences receive the most current information. Even with a plan, the participants' individual styles may be creating conflicts that can derail the collaboration. It is always a good idea to raise this concern in the group and try to hit it head on. A missing process step may also be contributing to a reduction in the group's energy; identify the gap and keep moving. Again, it is usually easier to work through these issues than it is to find and establish a new partnership. Just as a business knows the financial value of existing customer retention, the same applies to donors and partnerships.

**Evaluation.** Despite what we hear and know about the need for evaluation...groups resist it. I cannot even remember how many times I've asked partners for evaluation results, only to receive blank stares in return. It helps to agree up front on the definition of success and identify how you will measure it. A commitment to evaluate the group's work is one concrete activity that shows genuine commitment to the partnership, and the results may point to relationship issues that need attention. Instead of viewing evaluation as a burden, it should be regarded as another tool for sustaining the relationships.

**Celebration.** Growing a culture of appreciation is especially important in a partnership. If the group is stuck or meeting attendance is low, partners may be feeling a lack of zest. Since the various organizations that make up a partnership have their own celebration rituals, the group should create new, collective ones. These bring enormous symbolic value and help groups focus and enjoy the activities. And certainly celebrations should occur throughout the project, not only at its end.

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#### VIEWPOINT: IN MY EXPERIENCE



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

**Q.** Should senior staff be members of a merger Steering Committee?

**A.** No, this is a board-driven process and only board members constitute the official group. The CEOs or executive directors attend meetings but usually do not vote on committee business. Key staff members may support the process at the board's requests, however. For example, it would be difficult for a Steering Committee to complete due diligence without the help of each organization's chief financial person. One of the issues relates to confidentiality and whether the staff knows about the exploration. Groups that prefer to conduct negotiations in private generally limit the number of people involved.



**Q.** How do I know if I'm ready for a partnership?

**A.** There's a process for determining the viability of a partnership, whether it is a collaborative or a full corporate restructuring. Assessing your organization's readiness can save time, money and energy and head off initiatives that are destined to fail. Many colleagues have called when a partnership is falling apart and I wish we had explored viability before their discussions started. The fall edition of *Project Pointers* will address this further.

**Q.** Can't we just create an informal partnership and see where it goes?

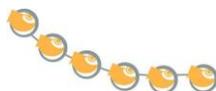
**A.** Maybe. This approach makes sense for some nonprofit work, especially if the nonprofits have not worked together before or the goals are fuzzy. And certainly not all collaborative work includes a goal of full corporate integration. But if the two leaders or executive committees have already mentioned the possibility of a merger, it saves time, energy, and money to establish a steering committee to review various partnership options. In general, it is more effective to start by discussing full corporate integration, then work backwards to a less complicated relationship if a merger proves to be unsound. Another reason to move forward with intentional discussions is the threat of lost opportunities. Given the speed of change in nonprofits today, most groups do not have long to decide about partners - they may soon be gone.

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

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## End Point

Whether it's an old friendship or an established human services partnership, take care with those that are special. Initiate communication, pay attention, address any concerns, and celebrate each other's accomplishments. A good recipe for a success.



Best wishes,

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## PARTNER SERVICES SPOTLIGHT



A typical day in my office finds me responding to a call from a colleague who asks, "Do you know anyone who can do \_\_\_\_\_?" Sometimes, I refer the caller to a well-established nonprofit firm or advisory group. Or, I suggest one of the amazing independent senior consultants with whom I work. These seasoned professionals bring a staggering amount of knowledge and experience to quickly address your needs -- and have already been evaluated by other clients, your colleagues.

Many inquiries relate to board issues, some of which can quickly be addressed. I work with several independents who are experts at the following:

### Board Development and Training

- Board succession planning, recruitment, and retention strategies
- Board retreats, workshops, and consulting to clarify board roles and responsibilities
- Identification of board's role in fund development
- Selection of governance structures and operational models
- Creation and revision of bylaws
- Document development consistent with 501(c)(3) regulations

Please [click here](#) to learn about my other partners. Let me know if you are looking for just the right person!

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## WORKSHOP REMINDER



Marta's popular Project Management Basics workshop will be offered in September. 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.

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## TOUCH POINT: CLIENT SPOTLIGHT



For nearly 65 years, **Redwood Rehabilitation Center** has provided children and adults with disabilities in Northern Kentucky a place to explore and grow their individual abilities. Redwood serves over 800 clients annually through its 22 programs ranging from educational, therapeutic and vocational services. Its state-of-the-art facility allows clients to learn, interact and receive vocational training while building upon their social skills to achieve the quality of life they deserve.

Redwood offers comprehensive services for clients ranging in age from infants to seniors, including:

**Children Services** - Nationally accredited (NAEYC) childcare for children ages six weeks through preschool; rated 3 STARS through Kentucky's STARS for KIDS NOW rating system; Prescribed Pediatric Extended Care (PPEC) for children with special health care needs; after school care for children with special needs; and, summer camp.

**Adult Services** - Adult day programs, life skills programs, employment skills training, job placement, and computer skills classes.

**Therapeutic Services** - Licensed speech, occupational, and physical therapists are available to provide assessments, evaluations, treatment, consultation, parent education, outpatient services, and/or home visitation to address developmental delays, augmentative communication, social thinking, sensory integration, seating/mobility, feeding, technology-based treatments, and other needs for both children and adults.

Redwood is also home to the **Assistive Technology Resource Center (ATRC)**. The ATRC is open to all members of the Northern Kentucky community, and offers an array of assistive technology that can be used to increase, maintain, or improve the capabilities of individuals with disabilities. Equipment is available for loan and demonstration to anyone in the community who wants to know more about the item before they make a purchase.

For more information, please call 859-331-0880 or visit [Redwoodnky.org](http://Redwoodnky.org).



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