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Ahhh . . . sunshine, baseball, flowers and dog walks that do not require five layers of clothing. Just as our individual energy levels have shot up, so have the number of calls I've received about human services partnerships. I do not believe this is mere coincidence. During winter's many challenges, it was difficult to think more expansively about possibilities and new initiatives. More recently, I've observed an increase in proactive conversations about the benefits of joining others to sustain services.

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When considering the many factors that support such discussions, it is easy to overlook the importance of board members and how they, individually and collectively, shape the process. This issue of Project Pointers addresses the board's specific role in creating closer relationships with other nonprofits.

## The Board's Role in Partnership Discussions

### The Big Picture

Before any potential partnership exploration begins, the organization must be ready. Ultimately, the board ensures readiness by conducting strategic planning, creating succession plans for key positions, and conserving resources. The readiness list is more extensive, of course, and rests on board talents ranging from financial acumen to networking expertise. In the absence of these systems and qualities, a partnership exploration is poorly timed. A potential partner will expect your nonprofit to be in "tip top shape" before it pursues a combination. At its simplest, a board that operates at a high level of effectiveness is already primed to fulfill its duties during a merger or other collaborative effort.

### Board Composition

If you have a broad mix of board members who are dynamic and engaged, you are already on your way. If not, this is a good time to assess the types of people you need. It is always helpful to achieve a balance between board members who have a history of organizational service with the newer ones who can bring fresh perspectives to governance. If certain skill sets are missing from your group, determine which of those skills you most need for

pursuing partnerships. As you recruit new members, look for those who think strategically and show an interest in entrepreneurship. Also think about potential board members who are active in various community initiatives and may serve on other boards. The value of ongoing board development is especially clear when two or more nonprofits consider a combination.

### **Partnership Criteria**

Good board members work from a deep understanding of the organization. The best ones take the initiative to learn and strategize. Nonprofits keep their boards up to date in a variety of ways but often fail to evaluate the effectiveness of the communication. First, ask if they prefer to receive information differently and what you can do to help. Once they demonstrate a solid grasp of program and operations knowledge, encourage them to begin the partnership conversations.

What does your human services organization have to offer another one? The board should extend its strategic planning discussions to include this topic. A candid discussion that promotes self awareness sets the stage for thinking about other organizations.

What would your ideal partner look like? What qualities make it attractive? Instead of a general, vague discussion, consider creating a checklist of characteristics such as location, staff size, funding sources and mission compatibility. After discussing each of these components, you may be surprised at how easily partnership criteria emerge. By keeping these intentional goals in mind, some specific nonprofit names will quickly come to mind.

### **Scouting Mindset**

The board should be composed of scouting mindsets, strategic thinkers who are constantly "out there" seeking new opportunities and assessing options for the future. They should be looking ahead and asking "what if?" questions as they move through their days and interact with other community leaders. Sometimes, a casual lunch with an old friend who serves on another board can result in a timely connection that benefits both nonprofits.

Organizations that are heavily dependent on government funding are particularly vulnerable these days. To offset the loss of income, board members can bring an entrepreneurial spirit to their work. The group should review its strengths and decide if enough business and marketing skills exist to support the development of a social enterprise. At a minimum, start a conversation about creative ways to bring additional dollars into the agency. Again, acquaintances may offer the missing ingredient that allows two boards to work together on an income-producing project.

### **Steering Committee Service**

Partnerships exist across a continuum, ranging from cooperation through full corporate integration. If the intent of the exploration is a merger, a

coordinating or steering committee is formed as soon as each board votes to approve the merger exploration. Typically, this group is composed of an equal number of representatives from each board and the CEOs. Each organization's executive committee may be part of the new joint committee or other board members may be selected instead. For example, it is always helpful to have at least one HR professional participate in the work. The group functions best when it includes a diverse range of skills, experiences and longevity with the respective nonprofits.

The steering committee's main task is to deliver to the boards a thoughtful recommendation for or against a merger. While this may sound straightforward, formal due diligence and an assessment of culture require a huge amount of work in addition to ongoing board commitments. And, due diligence is never truly complete - recommendations are made based on a comfort zone of "knowing enough" to move forward, one way or the other. In some cases, groups systematically look for issues that would prevent a partnership. A certain level of ambiguity floats through the process and can make some board members uneasy. If specific issues give the group pause, then the steering committee may well expand this negotiation process or decide against recommending a combination.

### **Emotional and Practical Support**

A partnership exploration represents a highly emotional process. No matter how much people embrace the missions, strong feelings can influence the outcome. One of the board's main roles is to provide support that fosters calm and direction. In addition to supporting its steering committee members, the board must provide an extra layer of support to the CEO. Deep feelings of identity loss and diminished control are predictable for staff, board and volunteers, but the organization's chief executive may experience these the most. In most cases, the executive committee spends extra time with the CEO and may also meet with the other executive director. In addition, leadership team members may need reassurance during this emotional chapter. Ideally, board members can find a balance between emotional presence and healthy detachment, an ideal point of reference.

### **Public Endorsement**

Partnership considerations are greatly enhanced when board members take seriously their roles as organizational ambassadors. This particular type of support for external stakeholders must occur throughout the process, particularly after the decision to partner has been made. At that point, the board serves as the chief "cheerleading" team in the community. By publicly supporting the new alliance and sharing its benefits with friends and colleagues, board members can generate excitement about the changes. They also serve as a sounding board for stakeholders, transmitting community perceptions to the CEO and senior leadership team.

The board will move in and out of the above roles, depending on the stage of the discussion and the specific topics of the day. During any of these steps, the ability to ask good questions may be the essential skill any governing body needs. A forward-thinking, engaged group can remind everyone to focus on

what's most important, the delivery of excellent services to those who need it most.

Best wishes,



## Workshop Announcement Project Management Basics

Marta's popular Project Management Basics workshop will be offered on Tuesday, September 16th from 9:00 a.m. - 12:00 p.m. at Interact for Health 3805 Edwards Road, Suite 500, Cincinnati, OH 45209 Register online at [Workshop Registration](#)

## Client Spotlight Easter Seals TriState

I had the great honor of working with Jewish Vocational Service and Easter Seals Work Resource Center as they merged to become Easter Seals TriState. From the minute I met President and CEO Pam Green, I knew I was in the presence of a highly competent whirlwind of talent and heart. It was especially gratifying to observe her very collegial relationship with Peter Bloch and the staff of JVS. Since the merger, great work continues as the combined organization's collaborative efforts improve lives in the community.

For example, Easter Seals TriState expanded a small program to launch Operation Vets THRIVE. This program helps veterans transition to the workforce and supports their integration into civilian life. With significant funding from The Farmer Family Foundation and The Carol Ann and Ralph V. Haile, Jr./U.S. Bank Foundation, this collaborative effort brought together more than 160 community leaders to address veterans' needs. Operation Vets THRIVE created a referral telephone line that assisted more than 350 veterans in its first six months. As the program approaches its one year anniversary, the nonprofit can be proud of its rapid response in linking resources to our veterans.

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