



Marta Brockmeyer, Ph.D. Project Pointers

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The Greater Cincinnati Foundation recently invited me to participate in an energizing conversation about partnerships. I joined leaders from the Clovernook Center for the Blind and Visually Impaired and the Cincinnati Association for Blind and Visually Impaired in addressing foundation donors and staff. Several people asked for a copy of the session's notes, which prompted me to expand the content and think about the top twenty-five things I've learned in the last decade. They follow:

Nonprofit Partnerships & Mergers: Lessons from Ten Years of Facilitation

1. The concept of partnership falls on a continuum, somewhere between cooperation and full corporate integration. It is important to define and redefine terms along the way.
2. Partnership projects are all different. No matter how intentional the planning effort, the process requires constant flexibility and creativity.
3. The most important factor in any partnership exploration is how each of the two leaders feels, not what they think. Emotionally healthy, self-aware executive directors are essential for a successful partnership process.
4. A previous history of working together is a key predictor of success. If the CEOs and staff have already partnered over the years, some shared knowledge and trust exists.
5. Board engagement is essential before, during and after the partnership exploration. A less-than-enthusiastic board member may be a good addition to the steering committee and wind up being the best ambassador.

- 6. Board members who have corporate merger experience may find the nonprofit process to be frustrating and slow. Instead of serving on the steering committee, they may prefer to serve in a content-specific support role.**
- 7. The two organizations should focus on what they want in terms of programming, mission and administrative systems. Once the vision is clear, attorneys can turn that dream into legal reality. If the steering committee focuses too much on the legal issues, the vision can be compromised.**
- 8. The integrity of the process is more important than the outcome decision. If people experience a sound, systematic and compassionate examination of all organizational factors, they will support the resulting decisions.**
- 9. A simple process is usually more effective than a complicated one. At some point, too many deliberations slow down the work.**
- 10. A decision against merging is not a failure. This may be the best possible outcome for all parties and tremendous internal growth can result from having gone through the process.**
- 11. A merger exploration is consuming. For the CEOs, who suddenly must confer on almost every key issue, this intense new effort will be added to an already demanding range of duties. Consider delaying, delegating or eliminating anything possible.**
- 12. Some leaders find it helpful to work with a professional coach during this process; these fees should be included in the project budget.**
- 13. Create a communication plan before the work begins and provide regular updates to stakeholders.**
- 14. Involve the staff early and often. There will always be concerns about confidentiality and staff anxiety, but invite key staff to help as soon as possible. Once the decision to partner is public, give the entire staff an opportunity to make suggestions for integration.**
- 15. The best path to building a new culture is through work. The sooner folks begin working together on concrete tasks and projects, the more easily trust and mutual appreciation will grow.**
- 16. Grief is part of the journey. Rather than dismissing concerns about lost traditions or identity, build in opportunities for all participants to express their feelings and design ways to retain the best of both cultures. Loss is an inevitable part of change.**
- 17. A few staff, board member and volunteers may voluntarily leave - and that may be ok. While we hope to retain all staff from both organizations, the new vision may not be a good fit for all.**

18. At the same time, a merger exploration should not be used to fire someone. Performance issues should be addressed first and separately. This is especially true if one board wants an "easy" way to remove its executive director.
19. A neutral party must facilitate the process. A skilled volunteer can fulfill this role, but a board member should never serve as facilitator.
20. A merger exploration requires dedicated administrative support, hopefully from the same person throughout the process. While not a voting member of the steering committee, this person serves as an integral part of the team.
21. A partnership exploration can be great fun! Those who meet regularly will develop their own language and humor, grow new friendships and enjoy the benefits of focusing on what matters to the community.
22. From the initial meetings between board members and the CEOs, record and maintain a history of the project. The written chronology will be helpful for future reporting and planning and is more difficult to construct after the fact.
23. Meetings should be held in a comfortable, informal space, ideally in a centrally located, neutral location. Formal rooms may symbolize an adversarial atmosphere and set the wrong tone.
24. The hardest phase follows the boards' vote to merge. Integration is much more challenging than the exploration process and takes much longer.
25. When in doubt, apply common sense.

It will be interesting to watch this list grow during the next few years. As new partnership explorations kick off this spring, I'm excited about learning. As always, please call if you have partnership thoughts or questions.

Happy Spring,



Please watch for the new website page (www.martabrockmeyer.com) that describes my team of partners! If your nonprofit is seeking just the right expertise, I will do my best to connect you with a seasoned, competent person or group.

Client Spotlight

Santa Maria and Literacy Center West crafted an even better organization as a result of their merger. While most of us have had great life opportunities, over 3,500 individuals that Santa Maria assists each year, do not.

Santa Maria provides a continuum of care to a wide range of people, children through adults, to both U.S.-born residents and immigrants. Its **Early Child Development / Parenting** programs address needs of first time at-risk mothers and their children, resulting in reduced infant mortality, and help parents prepare their children for kindergarten. **The Youth Program** works with Price Hill youth to increase their responsibility for the community and increase their attendance and success at school. Santa Maria's **Wellness Program** provides the target population with access to health education and health care, educates clients about the status of their health, and connects them to appropriate health care. **The Price Hill Financial Opportunity Center**, launched in 2011 and led by Santa Maria, helps low-to-moderate income families achieve financial stability by assisting with employment, public benefits access and financial education/coaching. The **Meals-on-Wheels Program**, begun in 1972, is the oldest and largest volunteer run meals-on-wheels program in Greater Cincinnati and serves the most frail older adults in our community. Santa Maria's **International Welcome Center** helps the Westside immigrant population acclimate to life in America. The **Literacy Center West Program** provides adult GED preparation.

Workshop Announcement

Project Management Workshop

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

Tuesday, September 24 from 9:00 a.m. - 12:00 p.m.

Register online at: [Workshop Registration](#)
at The Health Foundation of Greater Cincinnati
3805 Edwards Road, Suite 500, Cincinnati, OH 45209

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