



# Marta Brockmeyer, Ph.D. Project Pointers

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Lazy summer days? Not for my colleagues and certainly not for me this year. I'm currently working on five human services partnership explorations with varied goals -- collaborative through merger -- as well as supporting a community-wide planning project.

I also have completed revisions to my website and am particularly pleased with the new website page that presents my **virtual team**. I encourage you to learn more about these incredible independent professionals who bring a wealth of experience, knowledge and heart: [www.martabrockmeyer.com](http://www.martabrockmeyer.com).

## Giving Pause - Partnership Red Flags

When the right conditions exist, many benefits flow from a partnership exploration. When two or more nonprofits consider a more formal relationship that falls anywhere on the continuum from collaboration through merger, they essentially agree to assess the others' organizational health and potential. Surprisingly, one of the best outcomes may be a decision against pursuing a combination, when saying no is the best strategic move. It is not unusual for one party to thrive as a result of the process because they learn how good they are - and why the other party would not fit well. If your intuition tells you something is off, it probably is. This edition of Project Pointers examines eight red flags in partnership considerations.

## Ready - or not?

Partnerships are most likely to succeed when the organizations are strong. When the various entities work from positions of health and readiness, they bring energy, focus and an openness to change. Signs of readiness include current and practical strategic and succession plans, financial stability and a solid infrastructure for all systems. In addition, well-prepared nonprofits have conducted a thorough analysis of mission fit for all programs. Simply, they perform at a high level of awareness and competence. If one partner is vibrant and others are imploding, success is unlikely. Too often, troubled nonprofits regard a possible partnership as an opportunity to be saved.

## **Absence of collaborative history**

One of the best indicators of a good match is the shared history of the organizations. If the nonprofits have worked together well in the past or are currently providing joint services, a foundation of trust and understanding usually exists. Collaborative experiences with other organizations also influence how a partner approaches negotiations. If the leaders enjoyed positive collaborations in the past, they will naturally be more open to a new one. If not, the discussions may require more time and sensitivity.

## **Sluggish start**

The outcome of a partnership exploration can often be predicted after the first two meetings. The manner and speed with which a project is launched communicates volumes about an organization's priorities and expectations. If one partner cannot focus on details or fails to respond to routine requests, things can move like molasses. The inertia may well represent confusion, a reluctance to share information, or a lack of commitment. If this behavior continues, even after discussion and offers of support, a happy ending may be elusive.

## **Disengaged Board**

Most board members are creative, ethical, genuinely caring people. And, if a nonprofit wishes to explore a partnership, the board must be fully alive to possibilities and available to share resources as needed. An ineffective board is a huge liability for both organizations and its limitations can easily filter down to the nuts-and-bolts partnership work. The CEO needs the board's support to begin discussions with others and to offer guidance throughout negotiations. If that support is absent, the leader will not feel secure in taking risks or sharing confidential information. If the proposed partnership is expected to result in an outcome as impactful as a merger, the board should enthusiastically drive the process and pace of the work.

## **Not-so-hidden agenda**

Sadly, some boards propose a merger because they think it will be the easiest way to remove an executive director. Whether voiced or implied, such a goal is misguided. It places board members in a bad light, reflecting their failure to properly conduct due diligence, evaluate or even address performance improvement with the director. Of course, there is also a natural desire to avoid hurt feelings and drama. I've observed this situation a few times and know how it impacts partnership discussions-the process requires two fully sound and engaged leaders who are responsive and able to perform.

## Resistance to change

In a fantasy world, many of us would enjoy the benefits of change without having to change anything. Even for the leader who initiated the partnership exploration, ambivalence or fear can make it difficult to consider how services might be improved. It is helpful to have a conversation about loss and change before specific topics are raised. But there is a difference between dreading change and refusing to change. If you are working with someone who won't experiment with you or makes it clear that their organization's procedures and culture are better in every case, then your decision may be easy.

## "Interesting" records

Stories are told through our documents, paper or electronic. These stories can be encouraging, confusing or downright scary. Worse, key documents may be missing or withheld, often through no fault of the current leader. Things do disappear! But a nonprofit with a pattern of bad audits, sloppy records or reluctance to share information is not a good partnership candidate. Records may also reveal pending litigation or other liability concerns, including real estate complexities. This is one red flag that cannot be ignored.

## Disregard for process and planning

This barrier can be subtle, leading to passive aggressive behavior or overt sabotage. When an executive director consistently "loses" papers, fails to complete requests from the other leader, "forgets" group meetings and talks to seat mates during meetings, the process cannot move forward. Despite what a person may say in favor of a partnership exploration, planning details may be ignored. Or, the person may constantly interrupt others to try to override every agenda point on a schedule. If it becomes clear that someone is not committed to the process, think how difficult it will be when implementation begins.

A partnership exploration can be an exciting, productive process that greatly expands your capacity for serving clients. But starting the conversation is just that. If you learn that this particular match will not help your mission, withdrawal is the smartest, most humane step. While I cannot discuss specific projects by name, I've experienced **all** of the above red flags in recent years and know the **process can still lead to something positive**. I'd be happy to talk about ways to address these challenges.

Enjoy the rest of the summer,



## My Partnership Values

Project success requires the alignment of consultant and client values. I enjoy working with human services professionals who share the following:

- True commitment to change
- Focus on mission and client services
- Fairness and an inclusive process
- Active listening with heart and attention
- Intentional thinking and dedicated time for planning
- Respect and support for board, staff and volunteers
- Direct, compassionate communication
- Proactive attention to detail
- Enjoyment of learning together

## Workshop Announcement

### Project Management Workshop

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

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

at the Health Foundation of Greater Cincinnati

3805 Edwards Road, Suite 500, Cincinnati, OH 45209

Register online at [Workshop Registration](#)

Please check back for details about Marta's 2014 Project Management workshops at the Health Foundation

## Client Spotlight

As president and CEO of Cincinnati Early Learning Centers, Inc. (CELC), Patti Gleason has promoted excellence in early childhood programs for over thirty years. Patti works behind the scenes to advocate for our region's most at-risk children and families. All seven of the programs operated by CELC have achieved the highest quality rating from Ohio's Step Up to Quality (SUTQ).

In recent years, the importance of quality early learning programs has become a prominent feature of educational reform. As a result, more childcare programs hope to implement quality improvements, but staff may lack the time or expertise to redesign programs or procedures. A widespread need exists for management services, including daily administrative support, business operations, and best practices in financial planning, staff supervision, and program development.

**CELC is launching Management Assistance Services, a new effort to help other centers with their business and quality improvement operations. A key factor will be the emphasis on individual site autonomy and history, a focus that allows each center to remain a trusted resource for its neighborhood and community. The unique consulting and shared services project is designed to build the operating and programming capacity of more local centers.**

**For more information, please contact CELC at 513.961.2690.**

**Marta Brockmeyer, Ph.D.**

**553 East 4th Street Newport, KY 41071 859.581.7089**

**[Marta@MartaBrockmeyer.com](mailto:Marta@MartaBrockmeyer.com) - [www.MartaBrockmeyer.com](http://www.MartaBrockmeyer.com)**