



# Marta Brockmeyer, Ph.D. Project Pointers

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## Taking Good Care

Every year at this time, I wonder how nonprofit leaders manage to move through the holidays with such grace. I see you at meetings and social occasions, learn of the special events you plan for your clients and hear you talk about your family commitments. No matter which holidays you choose to celebrate (or choose to ignore), the conversations are the same as you balance so many demands on your time and hearts. As Maya Angelou wrote:

"I've learned that you can tell a lot about a person by the way he/she handles three things: a rainy day, lost luggage and tangled Christmas tree lights."

Most of you can handle all three at once--and then some. My wish is that you have at least one day during the holidays when you don't have to respond, a day that allows quiet and reflection.

I am trying to do the same. This year has been particularly challenging because so many clients are struggling with decisions about closing, reducing services or finding a partner under less than ideal circumstances. These are highly emotional discussions, and all the business tools in the world will not offset the stress and grief that accompany them. It is a good time to remind ourselves about **self care** for both the leader and the organization.

## **Take Good Care**

### **Protect the Core**

Securing the health of the organization's core is essential for moving into the next year. While this may seem obvious, disturbing financial or personnel trends are often ignored until a crisis results. Review strategic plans, implement a rigorous succession planning process, ask why debt is increasing each month, learn why funding isn't growing, dig deep to learn why staff are leaving. Simply, face reality. What is wrong and why is it wrong? It can be tempting to focus on peripheral endeavors while denying a crumbling organizational heart. The core requires constant attention.

### **Narrow the Focus**

Even if you have conducted a program analysis within the last couple of years, take another look at sustainability. If expensive programs provide marginal support for a small number of clients, it may be time to close them. If your staff is stretched in ways that interfere with thorough, quality service delivery, consider eliminating something. If you are torn in too many directions, is it possible that your nonprofit is trying to do too much - and not as well as it could? Saying no, limiting the range of options and narrowing your focus can extend the longevity of your nonprofit. The focus should remain on solid, measurable outcomes and superior client service delivery.

### **Invest in your Board**

Your board takes care of you as well as your organization. So often, board members want to do more but lack the information or tools they need. Start with a clear understanding of roles. For example, if the board is asked to bounce back and forth between high level governance decisions and the nuts and bolts of daily supervisory issues, no wonder they are confused about boundaries and who is responsible for what.

Developing a healthy board environment takes time and work on the board as well as on the nonprofit. Outdated, vague bylaws make planning difficult and are an easy problem to address. Consider establishing simple training sessions that fill knowledge and gaps and move the group toward more of a shared language and understanding. For example, some board members do not know how to read financial documents and are too embarrassed to admit it. This deficit interferes with realistic discussions about sustainability. The board should also adopt a culture that allows tough questions and true governance.

## Remember Yourself

We all have periods that require enormous investments of time and energy. These chapters may result from situations we could not control, and are rarely convenient. But when a human services leader perpetually puts the needs of the organization above his or her own health, concerns about the clients arise. When we fail to treat ourselves with compassion or set boundaries or employ common sense, we set a questionable tone for volunteers, board members and staff. A culture that fails to support self care has a chilling effect on client services. This is especially troubling when individual client plans include health goals. Please **treat yourself as an invaluable asset** and know that others are watching, perhaps imitating.

Self care involves consistent, intentional practices. Operate from a solid organizational core that is monitored regularly and from a personal core that is nurtured and rested. Whether you are dealing with lost luggage or the purchase of a new building, you will have the resilience to support your mission - and yourself.

Best wishes for the holidays,

A handwritten signature in black ink that reads "Maura". The signature is written in a cursive, flowing style.

## Client Spotlight

When asked about exceptional nonprofits or executive directors, I always mention Caracole. I would be hard-pressed to find a better leader than Linda Seiter, who has worked to provide services and housing for those living with HIV/AIDS. Caracole is an award-winning organization recognized for excellence, best practices and a collaborative culture.

Over the past two and a half years, Caracole has experienced unprecedented growth and expansion. While the mission stayed the same, the agency more than quadrupled its number of clients served (220 homeless individuals to 1,300), expanded the geographical reach to eight counties and tripled the case management staff. The integration of new clients and staff in such a short time resulted in streamlined administrative functions and renewed strategic thinking. As Linda says, it was a crash course in organizational development!

Caracole also enjoys a superb board and staff. Over the years I've observed a run of outstanding board members and officers and, again, cite it as an example of healthy board development. The staff not only exudes compassion and support, but follows best practices and true lifelong learning. Our entire community benefits from the organization's advocacy and commitment to human dignity.

For more information, please contact Caracole at 513.761.1480.

## **Workshop Announcement**

### **Project Management Workshop**

**Marta's popular Project Management Basics workshop  
will be offered on March 25, 2014 and  
September 16, 2014**

**from 9:00 a.m. - 12:00 p.m.**

**at Interact for Health**

**(formerly 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 Interact for Health**

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