

The Power of Partnerships

Insights from Leaders

A Case Study:

YWCA Sonoma County and
West County
Community Services

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Introduction

The Power of Partnerships: Insights from Leaders is presented as a companion to Blue Shield Against Violence and La Piana Consulting's *The Power of Partnerships: Strategic Restructuring Among Domestic Violence Organizations*,¹ funded by Blue Shield of California Foundation (BSCF), which uses four case study examples to illustrate the process of developing a successful partnership, the essence of which is summarized below.

“Successful strategic collaborations are motivated by clear purpose; developed through a thoughtful process of partner identification, negotiation, and agreement; and put into effect with well-supported implementation.” Bob Harrington, La Piana Consulting

This description clearly outlines the key components of any strategic collaboration, whether a joint program or a merger. But it does not tell the whole story. What is missing is an acknowledgement of the equally important leadership skills, behaviors, and mindsets that also play a critical part of any effective partnership. To help us explore these elements, we asked leaders from two organizations that recently negotiated a partnership agreement to share their candid reflections on the process.

In January 2012, the YWCA Sonoma County (YWCA) and West County Community Services (WCCS) entered into a Memorandum of Understanding to strengthen the provision of counseling services to domestic violence survivors. This case study follows their journey from partner exploration to negotiation and implementation, focusing on the experiences, breakthrough leadership moments, and personal commitments of these leaders to the clients and communities they serve.

Whereas *Strategic Restructuring Among Domestic Violence Organizations* follows the process of how various partnership agreements were developed and put into action, the flavor of this *Insights from Leaders* case study is more personal and introspective. Focusing on the relationship between the YWCA and WCCS, it uses the voices of leadership, highlighted in quotes and italics throughout, to illustrate how leadership behaviors helped create the conditions for successful partnership. These are the voices of seasoned CEOs who were very clear about their clients' needs, honest about their organizations' respective strengths and weaknesses, and who stepped into the partner exploration process open to the possibilities.

¹ Available on Blue Shield of California Foundation website at:
<http://www.blueshieldcafoundation.org/programs/blue-shield-against-violence/publications>.

Exploration and Assessment of Options

The YWCA is the leading domestic violence provider in Sonoma County, serving more than 4,500 clients a year. It has been in existence over 35 years and has focused on three major programs: advocacy, counseling, and shelter support. The YWCA was also a critical leader in establishing the local Family Justice Center.²



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In 2011, YWCA leadership recognized that its counseling program for domestic violence clients was struggling. With all the other programs for which it was responsible, the organization had not developed the core competency or resources necessary to make the counseling program a success. Under the leadership of CEO Denise Frey and Program Director Jennifer Lake, the YWCA sought technical support from Blue Shield Against Violence (BSAV), a program of BSCF, and began work with Bob Harrington and Amari Romero-Thomas of La Piana Consulting to clarify its programmatic goals, with a specific eye toward collaborative opportunities.

Denise and Jennifer describe some of the thinking that brought them to this decision:

I think that anytime one opens oneself up to examination, there's a concern. I likened it to a financial audit. People generally don't look forward to a financial audit, but I happen to look forward to them. There's a little bit of trepidation, but it's an opportunity to have professionals who are not involved in the day to day, who are detached, really observe and examine your organization and its programs and policies and relationships and give some recommendations. So, while there's always a little bit of, "Gosh, do we have a clean house before we invite the neighbors in?" I think there was enough trust to start the process.
(Denise Frey, YWCA)

Our goal going through this process was to figure out a way to continue to meet the therapy needs of our clients, and to be able to reach more people. And also to close some gaps that had been created because of decreased funding over the last three, four, five years. You know, every year, the counseling program takes a hit. We needed to do something that was more cost-effective than what we were already trying to do. (Jennifer Lake, YWCA)

It is always difficult for an organization to acknowledge that maybe it cannot “home grow” a program or service in a way that meets the needs of its clients. This takes courage and humbleness. Through the La Piana Consulting assessment process, however, one of the key recommendations that emerged was that the YWCA consider partnering with another nonprofit organization that could provide expertise in this important yet under-resourced counseling services program. The board was updated on this capacity building option and approved moving forward with looking for a partner.

² The Family Justice Center Sonoma County was created in 2011, supported by funding from BSCF, building on interagency collaboration “to protect the vulnerable, stop the violence, and restore hope.” (Online at: www.fjcsc.org.)

Denise and Jennifer continued to work with Bob to determine the criteria for selection and who might be good potential partners. They identified two well-known organizations in the Sonoma County human services sector, and engaged both in exploratory interviews. During these interviews, it became clear that one potential partner would be a better fit than the other.

WCCS is a multi-service agency that provides human and social services to youth, adults, and seniors. It has been in existence over 35 years and its programs include: counseling and prevention, adult and youth employment, a senior resource center, after school programs, and emergency food and housing services. In 2011, it merged with Family Service Agency Sonoma to streamline efforts and enhance services to the community.



Katrina Thurman, CEO of WCCS reflects on the mutual benefits that her organization and the YWCA saw in their potential partnership:

We considered what the strengths of each of the organizations were, and how we could partner. And we were very respectful of the fact that the YWCA knows about working with victims of domestic violence more than any other organization in the county, and how much we would appreciate bringing that expertise into our program.

It just felt like I was there as an executive director of an organization that had a group of staff with a skill set. Denise was there with an organization that didn't want to keep trying to manage a group of people with that skill set, because it was outside of their expertise. And so we were just determining whether what we had was really a good match.

Consultant Bob Harrington speaks to this openness as a critical part of the process:

Sometimes organizations have a concern that the nature of this process is somehow committing them to a particular agreement of partnership as the process moves forward. There really needs to be an understanding that this is an exploration and participants are not committing to a particular agreement until all of the areas have been discussed and explored.

There was a lot to be said for this potential partnership. The YWCA had the foundational strength of deep knowledge of and experience with domestic violence. WCCS had served families whose needs were varied and provided important clinical expertise. The YWCA had also partnered in the past with the Family Service Agency before it became a part of WCCS, so there was a precedent for working together. Finally, there was mutual respect and admiration between the CEOs of each organization, who had already known of each other for a few years. This all helped provide a foundation of mutual trust during the exploration process, as Katrina describes below.

I think the ego of the executive directors probably is the "make or break" factor in any conversation about any kind of partnership, and whether it's going to work at the end of the

day or not. Denise and I both came into the room already with a respect for each other. We were concerned about whether it was either going to be the best decision for each organization or not, but knew that there wasn't going to be hard feelings either way.

In the end, the YWCA asked WCCS to take the next step with them and enter into negotiations, and they accepted.

The Negotiations Process Begins

Entering into negotiations does not automatically mean that both parties will end up with a satisfactory result. Managing expectations during the negotiation phase is essential so that ALL options can be surfaced and discussed and ultimately an agreement starts to emerge.

Looking deeply into the cultural fit is one of the elements most neglected in partnership explorations. Sometimes the fit at the program level seems logical, yet once the negotiation process starts, conflicting cultural norms that drive each organization rise to the surface and may stall or even close down negotiations.

Selecting the right partner from the beginning can eliminate many of the pitfalls encountered during the negotiations process because the foundation of complementary cultures, values, and respect are already in place. Some of the questions that can help get a read if a partnership is the right cultural fit include:

- How formal is each organization? Make sure to discuss decision making. Who is involved? How is authority expressed? What is the role of the board?
- What is the prevailing communication style? How are achievements celebrated (or not)? Some cultures have strong norms about celebrations. Do individuals get acknowledged, or are only team successes noted?
- How are staff trained and supported? Look at what happens when a new person is hired. Those first 30-60 days tell a lot about organizational culture. Is it a sink-or-swim situation, or are supports in place?

For the YWCA and WCCS, asking and answering these kinds of questions helped build trust at a personal level, as well as at an organizational level.

She answered those questions honestly, and explained that she was looking for a cultural fit as much as she was a logical programmatic match. I just realized that kind of straightforwardness and honesty is very difficult to come by and I really value it when I find it. (Katrina Thurman, WCCS)

“Both organizations need to recognize the differences in their style, communications, and decision making.

This is important for all working relationships, but the greater the level of integration of the organizations, the greater the need to identify and assess the cultural elements and develop a conversation around how you're going to work through those issues.” Bob Harrington, La Piana Consulting

The leadership really establishes the tone and the culture of an organization. I think that between Katrina and me, there might be some differences when you look at specifics, but overall we set the same tone of openness and then of decision making. (Denise Frey, YWCA)

Keeping the mission at the center of the negotiations process is a critical component for success, and this ability was very apparent among YWCA and WCCS as they navigated all the questions that needed to be answered.

I think there is something to be said for checking your ego at the door and putting your mission in front of you the whole time. That's what alleviates the fear. I mean, I think it alleviates anxiety, knowing that it isn't about you as an individual. Although you as an individual leader matter tremendously to the success of the process, it's ultimately not about any of the individuals involved except for the clients that are at the receiving end of the mission-based services. If you can keep your focus on that outcome being delivered the best way it possibly can, then the partnership that best suits you will emerge naturally.

"This partnership has opened doorways for us to become more effective and more professional and streamlined. And at the end of the day, that alleviates stress of everybody involved." Jennifer Lake, YWCA

You know, an organization that is straightforward and is truly dedicated to serving its mission and it's not just existing to exist or raising money to raise money. The thought behind every action is the best interests of the client, and the staff shares that mindset in how they interact with clients and how they design programs to deliver services. (Katrina Thurman, WCCS)

Implementation – Making the Partnership Real

The YWCA and WCCS came together and created an Memorandum of Understanding that outlined how the WCCS would deliver the counseling services. Some of the components included the responsibilities for each agency, payment and billing specifics and working together on fundraising and advocacy.

Communicating the new partnership with staff is critical, as its success depends on their ongoing work and commitment. Both staffs were brought together for informal "get to know you" sessions. Denise, Jennifer, and Katrina also shared details at their respective staff meetings about how the work would flow from a practical day-to-day perspective. In this case, the cultural fit was so strong that both staffs easily embraced the new partnership.

Jennifer describes the impact of this partnership on her staff:

The staff was open to it and, if anything, thought we'd moved too slow. They're excited about the changes that we made because it seems to make it better for them. They're not trying to be therapists, and they don't have to. It makes their job easier.

Full implementation from a cultural perspective takes time. Bob Harrington explains:

In a less integrative form of partnership (as opposed to a merger) such as is described in this case study, it is somewhat easier in that this is a case of one organization providing a discrete service to the clients of another. However, the working relationships among staff involved in these services from both organizations still need to attend to how they communicate, coordinate, and work through the inevitable differences in expectations and style that will come up. It is very important that the leadership help their staff work through differences and create a process for addressing any issues.

In addition to communicating the new relationship to staff, part of any implementation process also includes sharing the partnership with the broader community. Time should be taken by all parties to ensure coordination and strategic messaging. The YWCA and WCCS are both enthusiastic about this partnership and proud of what they have achieved, making them eager to share their story.

Because of this partnership, we're going to be able to provide a greater number and more integrated level of services to victims of domestic violence and their children. I also think that there are many in the community (in both the nonprofit arena and the for-profit arena) who look at strategic partnership and mergers as the way to go right now, and I think they're going to be looking at this and saying, "Wow, you guys rock! How do you do it? How can we do this with our nonprofit? How can we get the dialogue going?" The county may want to know, "How did you manage this, and can we help in any way to facilitate this kind of discussion or process for other nonprofits?" (Denise Frey, YWCA)

There's probably a whole PR side to this around announcing the partnership, almost like walking around proudly with a banner saying, "Here's the new smart thing happening in the community in order to best utilize each organization's strengths. We've come together to do this for this set of individuals in need in our community." (Katrina Thurman, WCCS)

Food for Thought – Leadership Behaviors that Support Partnership

This partnership exploration ended with a more than satisfactory conclusion. Not only will clients be better served, but the leadership and staffs of both organizations truly feel connected and committed to one another in pursuing this shared goal.

There are several leadership behaviors that helped pave the way for this successful partnership.

- 1. Willingness to be transparent and honest – Openness during the exploration and negotiation process is essential so there are no surprises when it comes time to implement. Sharing details about the way you do the work and how it is supported can be intimidating. By**

"We weren't going to rip each other off. I showed her my budget. She showed me hers. We were just open and straightforward."
Katrina Thurman,
WCCS

demonstrating their integrity and that of their organizations, leaders can establish mutual trust.

2. **Maintaining positive intent and leaving egos at the door –** The exploration conversation may or may not lead to a partnership, but by bringing their best to the table, leaders can still walk away with a win-win situation regardless of the outcome, knowing they gave the process a solid chance to succeed. This includes knowing when not to partner, as Katrina reminds us below.

It's also important to trust your instincts. I think if you start to feel like it isn't going to work out in the best way for the client, trust that instinct, and don't be afraid to walk away.

3. **Creating a safe place for dialogue, debate, and resolution –** In these processes, other staff look to their leaders to see how they set the tone. Establishing a tone of mutual respect, clear communication, and trust in the process helps alleviate staff concerns and smooth the way for a potential partnership that is broadly accepted and embraced.
4. **Keeping the focus on the client and the mission –** At the end of the day, boards want to know that the partnership will help to serve clients and deliver on the mission. By keeping the mission ever present and integral to negotiations, the partnership can withstand the eyes of scrutiny from both internal and external stakeholders.

"Be willing to share, to share identity, to share power, and to know that by sharing power, you become more powerful – and that's something critical." Denise Frey, YWCA



Katrina Thurman, WCCS and Jennifer Lake, YWCA