

Working with Consultants

Steve Majors, Communications Director, Family Equality Council

Holly Minch, Lightbox Collaborative

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1. What resulted from the consulting project that was transformative?

Steve: I've been communications director little more than 18 months in 2011. Before that, the Communications department was not existent. The organization had a Communications Director but that person left prematurely and nothing happened. Part of my mandate was to build capacity for the Communications Department, with the two of us. There was a lot of work to be done, systems to be created, procedures, media databases, survey and assessment of our internal and external needs, commitments, and responsibilities. All weren't aligned at that point. There was no foundational messaging. All the messaging the organization had done in the last 5-6 years had been developed organically, scripted from research from other organizations, or developed through osmosis from talking to other movement leaders, not necessarily grounded in anything concrete, and there was no research, nothing. It was immediately clear that we needed some messaging and to do two things. First, we were talking about our work that was relevant, powerful, and intentional. Thought the way to begin and still not for the long term branding for our organization and our work is about the impact of the work that is valid and relevant. We were light years away from branding our organization that lifted up our unique identity.

The work Lightbox did was transformative. For the first time in our 30-year history, we have really great functional, aspirational and relevant messaging about our work and the impact of our work. We were able to infuse that into all of our communications. Not just media relations, but all of our communications to every possible stakeholder you can imagine - board, staff, media, public education campaigns and partners in the movement, and admittedly struggling with that since you're doing a bit of our work and we do a bit of your work so how are we different?

First time in our history, we speak clearly and concisely about why we matter and what we do!

Holly: For the organization at the beginning of our work together, it was not uncommon that the program work is overdeveloped, and the market niche or larger position is underdeveloped. That was certainly true for FEC in that not so much attention was paid to the market position. The big transformation was offering how the organization talked about their role in the movement. It is about LGBT parents' rights and acceptance of LGBT families that were different.

We helped shift thinking about and to parents, families... less on what's difference but more on what's similar.

That has been the transformative pathway to talk to those who are unconverted to place the emphasis on families, instead of LGBT only. It's become the differentiator.

Steve: It's a different pathway with a wider audience, not to convert. In four or five months we have done a lot of positioning of ourselves as an organization that speaks to the needs of modern families, including those who are LGBT. In our politics and program work, we emphasize issues we work on with modern families that include LGBT families. It's given us different pathways to talk to those who are not part of our supporters about our work. It's given us an opportunity to increase the capacity of our work to a much larger audience.

2. How was FEC "ready" for this project?

Steve: There was buy-in from board to staffers. That was the first indication of our readiness. The first board meeting that I attended, they felt there was inconsistency about how we talked about ourselves. The executive team, senior level management team, and day-to-day messaging that happens 1:1 at the associate level and parents and parent groups were struggling. They needed messages for those groups.

The other indication was the organization can have institutional paralysis marked by nobody here has been here a decade. So there was a lot of willingness to take calculated risks. This was not an institution in stasis. We recognized the fact that we were evolving to a new level of professionalism.

The project happened in a particular time... things happening that were aligned, visual branding with our website that allowed us to do those two projects, take the messages from Lightbox and incorporate on our new website. That was a unique opportunity with a lot of our collateral materials needed updating and refreshing. It was perfect timing.

Holly: A happy accident. All was really well thought out on FEC's part to stack them up. Each small piece added up to the sum of their parts. They were smart about that and a treat to work with. There was reverse engineering... so often clients are focused on product, or training. But from the first conversation, we know we need to change the organization in this way... messaging, smart thinking about how to roll this out in the organization and think about what people needed. So the difference was to focus on transformation rather than the product.

They talked about success of project was results and not products. It was a real thoughtful partnership in terms of what needed to go into the project, and how to roll it out across the organization. In negotiating the scope, they wanted the training for staff and board and orient people on how to use it.

3. Looking back, knowing what you know now, what's one thing you would have done differently?

Steve: A couple of things... it was a happy accident and somewhat intentional. This time last year, we contracted with an outside vendor to do a 30th year video for us. We were able to send all of the messaging to the producer to say, "Look this needs to be a part of who we are, we have to incorporate our messages." We also did a branding, tagline for our anniversary and we wrapped the messages into that.

The only thing I would have layered on was a mid-year check in to make sure we weren't straying too far, and make sure the messages were infused. We did that internally around June and found a couple of spots where our messages strayed. I would've gone back to Lightbox and asked them for that. They were so incredibly giving of their time, in ways the original contract didn't call for. They were incredibly generous. The implementation document was great, some of which we followed, some we will use in 2013. Messaging is organic; you tweak and refine it as you go. The core messaging is there, delivered a year ago by Lightbox, in small ways we updated them a bit. I would have built in a six or nine month check in to say, here's what we're thinking, does this sound OK?

You find things out, we're hearing this... by and large, 99% of what was delivered is being used.

Holly: At the beginning of the engagement, would you have known the value of that follow up?

Steve: Yes and you just never know until you get there! Recommend prior to six months, you ask for an internal audit, see the website, last three press releases, any collateral materials, a speech, public presentation. And then do the six months check in to be grounded in fact. How was this received? Here are some things to consider... another re-alignment.

Holly: It's a tune up. At what point to introduce to client? Maybe towards the end? We've done extensive research in the LGBT space to build common ground. We could've done a better job looping back FEC folks in the research. Do you feel like it would have been a value-add to wire you in to those research?

Steve: we have those connections and it always helps to find those points of intersections from an outside party.

4. Assuming Steve has worked with consultants before, what made this partnership with Holly different? More joyous? More impact? And, for Holly, you've worked with lots of social sector leaders, what made Steve stand out?

Steve: Holly's incredibly responsive. You sometimes work with consultants and they're overcapacity and don't have the capacity to work with each client. Lightbox had a clear plan for

not only delivery of the products, but to help us with implementation. So often folks will email a binder, here you go. They were true partners when we entered implementation in ways they proposed and we asked. They were true partners. They took a lot of time on the front end listening. That was so important. With the network of clients Lightbox have they could have pulled stuff off the shelf. They recognized we were a distinct client, started with a clean slate, there might be similarities with other folks, but treated us as client zero, as their first client. They were very flexible. There were some real challenges in terms of scheduling. We were trying to do staff and board training. They had a great attitude, can do, were flexible with us, to make sure we got the full effect of the consulting. They delivered everything they promised.

Holly: Steve in particular had a skill on the client side of the equation to align inputs from the consultant. He teed up the chess board so things would work just so. He put a lot of energy in the organization to do this. Most projects that go off the rail comes from the internal leader abdicating this responsibility or thinking that's the consultant's job. Steve teed up the internal work well to be transformative and not just the deliverable.

This is an organization that was totally prepared to have a Zen-like beginner's mind. They have a huge range of expertise... but came to the project with an attitude that said "we think this may work but we don't know what we don't know..." and not protecting the way we've always done it, and any suggestions to do things in a new way was a critique. We pushed them a bit, they were ready to suspend their disbelief. We asked them to talk about their issues in a really different way, they were "Really?" they leaned in and were open to experimentation. They didn't have an exact definition of this is how it was done.

5. How did you find each other?

Haas Jr. Fund's FLA process, FEC got a specific recommendation through the grant to include capacity building. Steve didn't feel any pressure around the recommendation, asked for a formal proposal, talked about our expectations and felt completely comfortable with Lightbox.

Haas give the money to the organization and FEC was in charge of their destiny. We really commend Haas for that. Other foundations pay the consultants directly. Grantees feel like "Are we the client or the foundation, and how much is traveling through the grapevine?"

With Haas, it's clear that the grantee is driving the project.

Tips:

Have and value having a leader inside an organization; for the consultant to NOT undervalue the in house counterpart.

Recognize the consultant is not the expert.