

# **Working with Consultants**

## **Lester Strong, AARP**

### **David La Piana, La Piana Consulting**

Interview 8/15/2012

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

**Lester:** It was David and his team's sense of the possible, but also being immensely pragmatic. When you think about what we were bringing to the La Piana team, merging a roughly \$3M nonprofit with a \$1.2B nonprofit corporation with just massively different systems, everything, so different, and yet, they were able to do two things: Number one, keep reminding us of why we were doing it, and how there was real benefit to each organization. I remember David saying to AARP at the time, this investment you're going to make, you should double it, you are going to get so much in return. Such as improving your image on Capitol Hill, and results for kids. For us, David and his team were constantly reminding us of how we could reach scale with our program with integrity; that was our mantra, imagine what we could do with the resources of AARP. Keep us focused on why we were doing it.

Secondly, immensely pragmatic about how you'd get it done, what's real, always taking us from a "pie in the sky" vision, and walking us through each step in an intentional way of the various pieces that needed to be addressed for the project to be sustainable. And, we came out on the other end.

**David:** as a consultant coming in to a complex situation, the goal was to merge, but that didn't come along until six months after the project started. From our perspective, these two were uneven partners. The thing that struck me, and made everything possible was Lester's vision making his organization bigger than its small size. Lester projected a big vision to teach a million kids to read by third grade, which would move the dial on poverty... changing the face of poverty. His ability to articulate that got AARP's attention. AARP treated Lester and his folks with great respect like they were equals. That's the only way to go forward. Lester and Barb have become great friends.

We got lucky and got a good client here. It came at a strategic moment when AARP felt like here's an opportunity to do something big, with a public face that was uniformly positive.

#### **2. How was AARP/EC "ready" for this project?**

**Lester:** I don't know if we were ready. We had an idea and a vision. What was driving our vision was we had incredibly powerful data in that two randomized controlled studies on our work

showed significant impact for children. We knew that what we had worked. It was no longer a question of tweaking... but getting this vaccine to as many children as possible. We knew we couldn't do it ourselves but needed a partner to help drive the numbers and take it to scale.

Frankly, we were just trying to make payroll and at the same time carving out a significant portion of time to do the feasibility study. At the beginning of the project, we were not thinking about let's merge, but let's see if it makes sense. Once it makes sense, then make the merger possible. We were doing all this work without any guarantee of outcome. An incredible team poured over the work, did the data prep, and got our and AARP's board to say "this makes sense."

Again, not only was it above and beyond what our team did, David helped put together a careful plan so we were not flailing around but followed a methodical set of steps, and got help from his team to walk us through.

**David:** They came with all the right questions, and were not sure what the answers were. As consultants, we help with that. We can put together a process to help figure out what the answers are. Lester had complex, aggressive goals, and was clear what the goals were. We were working on a couple of different levels: the boards had to be convinced, and senior staff had to buy in. That was 10% of the work. The other ninety percent of the work was finance, building a model, and that was done with a team from both organizations. Our consultants camped out with Lester's staff and became a real team. You could see this at the meetings. The client reported and presented the information with help from our consultants. The CEO of AARP came in and that was a dramatic moment, the team had done all the work, and the political side of the work with the boards I had done.

### 3. What are two or three things that made your partnership tick?

**Lester:** I wanted David... we had done some work together when I was with Civic Ventures. I knew he was straight. I wasn't going to get a lot of generalities, flattery, and if something didn't make sense he would say so. David would not put a lot of time into a project that was doomed to fail. We asked the right questions and he did too. Other La Piana team members were fantastic, guiding us to where we needed to go. It wasn't an "at-a- distance" relationship. They were imbedded in our organization from the time it launched. I had tremendous comfort and confidence in David's team. They were highly accessible. I could pick up the phone to ask David a question and he'd be there to answer; that meant a lot.

**David:** there are times when you come into a client situation, with a compelling vision, great mission, but you don't like the people. It's so much easier to work with people you like. We both went to bad inner-city high schools and played football. We connected based on our common experiences. It went all the way along. Barb and her team... they were people we liked. We were real people together. It made the team work. Vance and Mary and Brent, they felt very connected to their counterparts at the client organizations. That shouldn't be an important factor but it is.

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

**Lester:** Absolutely. I would have held David longer to build out the implementation plan. What we're now doing is reality testing the business case we made. Some of it is holding up and some not. With the rigor that David's team brings we would've gotten to it quicker. We would have come farther if we had more money to hold him through the end of 2012, or the beginning of 2012, since the project wrapped up in May 2011. If we had more money to have them in implementation we would have gone farther.

**David:** And that is something we told you. This had already cost them a good chunk of money... This started as a business-planning project that turned into a merger. We realized we couldn't wait four months on the business planning while we did the merger work... Looking back, I wondered if the way we did the merger negotiations, on the quick, one or two meetings on merger and we went forward, if that mattered. We didn't have as careful of merger negotiations as we normally would have.

**Lester:** It was all backwards the way we did it. And yet, no fault of David's, we started with a different premise, at the end of the day, AARP said, "we just want you guys here." At the end of it, had we been with somebody else without the depth of merger knowledge, it would have been a real mess. The agility of the La Piana team to move that way saved it and served us really well. Had we done it in a more "logical" way it would have been better, but there was no time. We have had a few bumps post-merger, like leveling and salaries.

**5. Assuming Lester has worked with consultants before, what made this partnership with David different? More joyous? More impactful? And, for David, you've worked with lots of social sector leaders, what made Lester stand out?**

**Lester:** I didn't think of it as joyous. It's like being in a foxhole. You know the person has your back. That level of confidence is hugely important and I had it in David. I don't always have it in other consultants. With other consultants, there's this sense of distance; they helicopter in and give you a couple of choice bits of wisdom and they go away... they don't really understand or appreciate the depth of the situation. I've worked with great consultants. The ones who I'm the most happy with are the ones who are clear on the vision, and guide us toward that vision, then I can trust what they say... not telling me what I want to hear, but from their expert view. When you're in the middle of a messy situation, I don't want a consultant to blow smoke, but really get what we're up against.

**David:** The first reason we clicked is Lester's vision and goal of what they wanted to accomplish. That was so clear. Sometimes clients want a vague goal like world peace and social justice and you can't put a handle on it. Here is a vision of a million kids, if they learn to read, we can

change the country. This is how to have a clear and compelling vision. Lester being able to articulate that everywhere he went made him stand out. He's both an ego-less and confident leader... Other leaders I've worked with worry about "what will happen to me? Do I really want to do this?" Lester stayed with the interest of the mission. That was motivating and compelling.

On the AARP side, Barb, several levels down from the CEO, became the internal advocate. Lester's board asked "We're the flavor of the month, what will happen 6 months from now, how do we know we're part of your plans going forward?" It's hard to answer that question in black and white. However, Barb on her end convinced everyone to have faith, that the goal is so important to AARP's mission, just as to Experience Corps'. There were good visionaries committed to this on both sides.

We also had adequate resources to do the work. Many times, we have had to figure out how to do the extent of the work that clients ask for with very little money. Here we had substantial resources to enable our team to devote a lot of time.

## **6. How did you find each other?**

**Lester:** the first time I met David I was on the board of Civic Ventures and we were working to transition Experience Corps out from CV into a separate 501c3. One of the consultants we went to was David to help us with the transition.

**David:** Hired to do strategic planning for Civic Ventures by Marc Friedman. They considered this transition for years!

**Lester:** We find consultants through word of mouth, by talking to folks like Ann Bowers who David knows. You talk to people you trust. It speaks to the credibility he has. People would listen to what I'm thinking and say, "This is a La Piana project. "

**David:** Clients should talk to people who actually used the consultant. Another challenge for consultants is getting the right kind of work. For years we were known for merger work. It took a leap for us to be seen as strategy and business planning experts.

**Lester:** User reviews? If asked for opinions, I'd give but you'd have to prod me... review a book or movie, I don't do it. If I'm prodded, heard you just had a consultancy, and make it easy, here're three or five questions. If prompted, it would be better. And, a level of anonymity too.