1

IT'S NOT ME, IT'S YOU

The Value of Addressing Conflict Head On

Morgan Shidler Photography

Corey Newhouse

Corey Newhouse, MPP, is the founder and principal of Public Profit, an evaluation consultancy that helps mission-driven organizations measure and manage what matters.

It's tough to predict the day that you'll lose your largest client. Like so many things, it's obvious to me now, but I sure didn't see it coming that day. Losing a quarter of my company's revenue in half an hour hurt. It hurt a lot. The good news is that our company is still standing, and we've learned a lot from the mistakes that culminated in the failure I'm about to describe.

ABOUT ME

I have been a professional evaluator since 2003, primarily as an external consultant. I founded Public Profit in 2007; we help mission-driven organizations use data to improve the quality of their services to the community. Over the course of my career I've had the good fortune to work with organizations ranging from policy advocates to museums, foundations, and schools. I love helping our clients learn to use data to improve.

In this chapter, I share how I learned to approach conflict with clients directly and constructively. Although I write from the perspective of an external evaluation consultant, the lessons can apply to any situation in which an evaluator is working in service to another team.

DESCRIPTION OF THE EVALUATION

Because we are a small consulting firm, our growth is directly tied to the size and duration of our projects, and there's often stiff competition for the most lucrative contracts. We were therefore thrilled to be selected to evaluate a large portfolio of youth programs supported by a major funder, both because it offered a chance to use a variety of methods and because it vastly improved our bottom line.

The evaluation itself was sweeping in scope; it included more than 100 program sites among dozens of grantees that were funded to do everything from sports leagues to arts programming to summer camps. The client, which funded the programs, was interested in traditional monitoring metrics, like program enrollment and attendance figures, and also gave us substantial latitude to craft an evaluation that explored their grantee portfolio. In response, we created a mixed methods evaluation design that incorporated multiple surveys, structured program observations, focus groups, case studies, and interviews. Because the portfolio was so large, we essentially conducted three separate evaluation studies, each aligned with a different funding strategy. As the external evaluator, we were responsible for orienting grantees to the project, collecting most of the data, and producing reports for a variety of audiences.

The first year of the project was pretty great. We got to know the many terrific organizations in the grant portfolio, collected tons of useful data, and created a variety of written reports that were (eventually) well received by the client. As with any new client, we learned about their quirks, too. For example, although we worked directly with our client's evaluation manager, the client instituted an extensive review process for the evaluation involving multiple people for nearly every part of the project, which we didn't anticipate when building our budget and work plan. This feedback from multiple people was often contradictory, making it difficult to understand what to do next. Resolving these contradictory requests required even more of our time. In addition, the client was fond of old school reporting methods, which we learned primarily by receiving negative feedback to early report drafts, which our client felt were too "pretty" to be taken seriously.

We're most effective when we flex our approach to meet the needs of our clients, so we did our best to adjust in the first year. Yet, we grumbled about it internally, bemoaning their bureaucratic ways and strategizing about how to nudge them into being more timely and consistent with their input. We also sought ways to convince them to modernize their approach to reporting, frequently forwarding blog posts and articles on the topic.

We overran our first year's project budget by about 50%. These overruns were due to our "just say yes" approach for a lucrative project, along with the extra time needed to navigate the lengthy review process. And although I was pleased with the quality of our work in the first year, as a business owner I knew that we had to buckle down on cost management to make this work. I asked our team to really hold the line in the second year of the project, agreeing to add components to the evaluation only if others were taken out.

With the benefit of hindsight, I now realize there were three issues that affected the project in the second year:

- Our internal grumbling didn't always stay inside the office. Our frustrations with the funder's evaluation manager sometimes bubbled over into our interactions, whether via email or during in-person meetings.

- The contradictory input from the evaluation manager and other staff members in the foundation about our work reflected deeper organizational disagreements about the purpose of our evaluation. These disagreements remained unresolved.

- Our major cost overruns in Year 1 required much stronger budget management in Year 2. We didn't make this decision crystal clear to the evaluation manager.

THE MISTAKE OR CHALLENGE

In the second year of the project, the evaluation manager was on extended leave, so we developed a scope of work with another member of the organization. Our temporary point of contact mentioned that we'd need to be flexible with the evaluation, since the evaluation manager would want to make some changes upon their return. I figured this meant we'd need to update some data collection tools and swap out a few focus groups for interviews, but honestly, my thoughts at the time were much more focused on how to stay within budget. I didn't really push to understand what "be flexible" meant at the time.

Once back on the job, the evaluation manager began asking our team fundamental questions about our approach, ranging from whether we could include additional stakeholder interviews for one of the sub-studies, to making substantial changes to the content and timing of data collection tools that we already considered final. These requests were annoying for our team, as it felt like we were being second-guessed every step of the way. And in keeping with the "no new tasks" mandate, our team sought to find other ways to cut back so that we could stay within budget. These negotiations were often tense, and more than once the evaluation manager mentioned feeling shortchanged.

Our grumbling intensified as the second year progressed, because the evaluation manager seemed to be acting ever more unpredictably and unfairly. From our point of view, we kept receiving major, last-minute change requests from the evaluation manager, with little appreciation for how challenging—and time-consuming—it was to make major mid-course adjustments to such a complex study. Needless to say, this was a constant source of frustration and anxiety for our team.

Jana Curll

Then one day, during a run-of-the-mill check-in with the evaluation manager, they told me, "This is a really difficult thing to say, but we aren't going to continue working with you anymore." Though this happened years ago, my stomach still clenches when I think of that meeting. I was stunned. And terrified, and embarrassed, and really mad.

With the benefit of years' worth of hindsight, it was obvious that our contract wouldn't continue, but at the moment it felt like a huge surprise. Fortunately, our soon-to-be-former client had the good grace to explain, from their perspective, what went wrong.

It turns out that "be flexible" for the client meant that we should have been prepared to completely re-cast the evaluation design in concert with the evaluation manager. The scope of work in our contract was intended only as a placeholder.

Imagine the evaluation manager's surprise and frustration when we tried to hold the line on almost every aspect of that placeholder plan!

Moreover, the evaluation manager was continually receiving requests from their own stakeholders—including elected officials, grantees, and colleagues—to look into different aspects of the programs in our evaluation, potentially requiring shifts to the data we collected. But there were thousands of surveys and dozens of site visits in play for this project, and simply changing course on a dime wasn't feasible for us. To make matters worse, these change requests were also rarely aligned with our data collection schedule. We didn't find a way to balance these tensions.

The evaluation manager, expecting an academically oriented reporting style, also misunderstood our more spacious, findings-first layout as an unprofessional mess rife with formatting errors. It turns out we hadn't communicated our approach very well, and our drafts were therefore perceived as poor-quality deliverables.

And those "internal" grumblings of ours? Our client was keenly aware that we were frustrated by this project.

LESSONS LEARNED

My lessons learned from this experience apply to me as both a leader and a business owner.

- **If you are frustrated, your client is, too.** This was the huge oversight of mine. I built an internal narrative that set our client as an impossible-to-please person, rather than a partner attempting to get a job done. This led me to assume that we were the only frustrated party, which was utterly incorrect. I missed many valuable opportunities to improve our relationship as a result. Now we encourage our staff to establish and maintain a constructive, growth-oriented tone during internal meetings, even when projects are frustrating or don't go as planned. This positively affects how we interact with our clients, too. There's real power in how you think and talk about clients; as a leader, it is my job to mind the tone we take.
- **Misaligned expectations generate conflict.** We didn't fully understand our client's expectations for the second year of the evaluation, and so we acted in ways that appeared to disregard their needs. On the flip side, they acted as if they paid for a limitless amount of evaluation services by asking for frequent additions to our scope of work, which wasn't true. Unfortunately, we didn't surface these issues in a constructive way, so they festered for everyone. Re-framing this has been helpful to our team, as we're now better able to identify cases where we need to revisit our expectations with our clients.

- **The leader is responsible for addressing conflict.** In part because I wanted to empower the other staff on the project, and mostly because I am deeply conflict averse, I failed to constructively address the problems with this project. The few calls I had with the evaluation manager about our challenges didn't get to root causes, and I spent too much time defending my team instead of understanding the client's perspective. These days I'm much more likely to check in with our clients about how they are feeling about our services, even when they aren't as happy as I'd like. Simply expressing concern about our client's needs goes a long way toward resolving any conflicts that arise.

REFLECTIVE QUESTIONS

1. What interpersonal skills should a leader on an evaluation team possess in order to successfully identify and address conflict with clients?
2. How might re-framing this evaluation as developmental, rather than summative, have improved everyone's experience?
3. Evaluation can be difficult and frustrating at times. How can evaluators keep a constructive mindset in the midst of challenges?