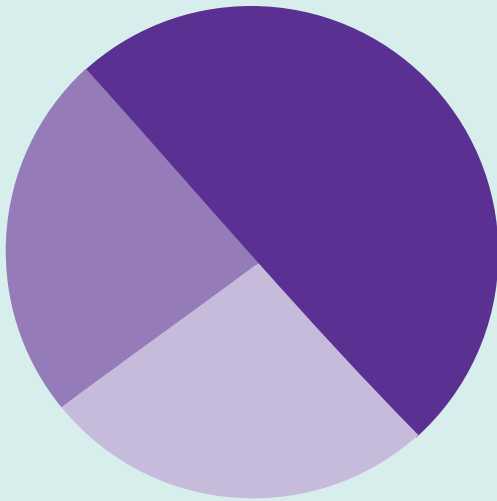


SOFT SKILLS FOR HARD DATA

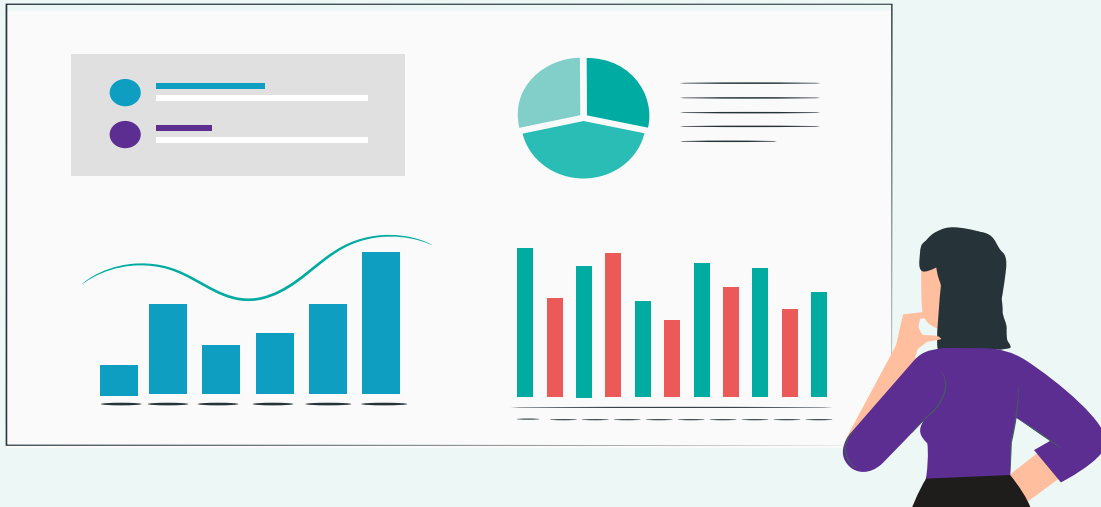


Insights and tips to help professionals discuss challenging data with key stakeholders in real-time



SCENARIO #1: NOT ALL DATA REPORT POSITIVE RESULTS

You are sitting in a room with your key stakeholders and staring at a data slide that shows minimal growth in an area you had hoped to see impact. Your heart sinks and your head races—what will this mean for our funding? For community perceptions? For the beating we might take in this room now from our stakeholders?



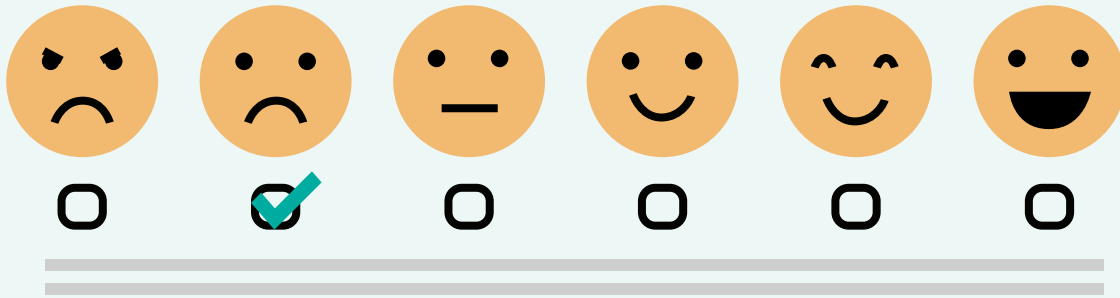
What is needed in this moment? How can you lead effectively and drive your initiative or organization toward productive next steps?

TIPS TO GUIDE YOU

- 1 Model curiosity (not defensiveness) and encourage the people in the room to do the same. *Ask questions about what the data is telling you and what it is isn't telling you?*
- 2 Surface assumptions. *People may react with judgment or conclusions but don't assume you know how they are interpreting the data or what assumptions they hold. Ask.*
- 3 Lean into vulnerability and openness. *It might be scary to share less than stellar data results with those outside your innermost circle. And yet, time and again, those who are willing to be open about imperfections and address them engender far more trust than those who think it is safer to hide the bad news.*

SCENARIO #2: PARTICIPANTS ARE UNSATISFIED WITH A PROGRAM

Your organization distributes a satisfaction survey to the participants in one of your programs. Your survey asks both close-ended and open-ended questions. As you review the open-ended responses, you see that a significant number of respondents feel that the level is pitched too low. They don't feel challenged enough. A small percentage of them specifically call out the director of the program as part of the problem.



Do you have a personnel issue, or do you need to look more fundamentally at the nature of the program or the intended audience? How can you and the program director grapple effectively with the substantive feedback when the director is implicated?

TIPS TO GUIDE YOU

- 1** Separate the person from the issue. *It is important to remember that only a minority of respondents named your director. And, the director, who may be smarting from the feedback, will also have a tendency to magnify these results. To start, treat them separately.*
- 2** Look for the 2% truth. *If your director is struggling to see their part, it can be helpful to frame the conversation as follows: "Imagine that our participants are 98% off-base with respect to your responsibility here. They are not seeing the whole picture. But what if there was some truth to 2% of what they were saying? What is that 2%?" This can create some safety and permission for self-reflection that still preserves the dignity of the director.*
- 3** Deepen your understanding of the data before turning to problem solving. *Surveys of this nature are critically valuable, and they are often best used as a general indicator and a prompt for more engagement with your stakeholders. When you have a staff conversation that focuses on the substance, you can ask yourselves questions like: What assumptions have we been working with as we designed the program? Does any of this data cause us to rethink those assumptions? Who might we share this data with to broaden our own thinking of what it is telling us? Who can we reach out to for a conversation that will deepen our thinking and help us frame the right problem to solve?*

SCENARIO #3: DATA SHOW A NEED FOR CHANGE

You have just received the results from a stakeholder assessment. Based on the synthesized data from your funders and program participants, you realize that the organization will have to change to survive. As the discussions unfold around the staff and board tables, you can feel the anxiety in the room. And there are competing views on how to proceed.



Often the important and tough choices that stem from grappling with data are sidestepped to avoid controversy. It never feels like the right time to rock the boat.

TIPS TO GUIDE YOU

- 1** Make space for all the voices in the system. *It can be tempting to shut down certain opinions or make people wrong for having a dissenting view. What is more helpful is to see that every perspective has some wisdom in it (e.g., a cautious or risk-averse voice may help you to be more planful). And remember that the data has a voice in this scenario as well—even if it is hard to swallow what it is telling you, make sure there is someone in the room who is familiar enough with the data to represent the findings.*
- 2** Name the elephants. *You know what they are: You might have to let go of some staff and bring on new talent. You might have to downsize. You might have to have a “quiet” year for an internal focus to regroup. You might have to let go of a long-time funder or narrow or expand your mission. And—hardest of all—you, yourself, may no longer be the right leader for the next phase. Put it out there. Be brave, you will be modeling the kind of honest but tough conversations that will yield a better result.*
- 3** Take the time to get clear about decisions you may need to make with the results of this evaluation. *The questions you can pursue over time can have real import for the way you strategically plan ahead. Your evaluator can be a critical partner in that work if you are clear yourself and if you have established transparent and ongoing communication with the evaluator.*

SCENARIO #4: EVALUATION RESULTS ARE NOT COMPELLING

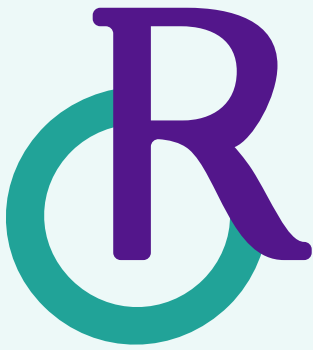
Your evaluator has just delivered an interim verbal report on their findings to date. You are still at the beginning of a multi-year process, but you are concerned. They are not really telling you anything you don't know. What will the value be going forward? How can you ensure that you are really learning?



Maybe this is your first evaluation with a third-party consultant. Or maybe you keep extraordinarily close tabs on the inside of your program. Sounds like a conversation with your evaluator is in order.

TIPS TO GUIDE YOU

- 1** Acknowledge your part. *Be honest (and kind) with your evaluator. Although this may feel like a failure of the evaluator, stop to consider how you may not have set the evaluator up for success. Or perhaps you didn't isolate the right evaluation questions. All these can be worked through and it will be more constructive if it feels like you each have a role to play.*
- 2** Be patient with the process. *Especially in multi-year projects, the data and the insights deepen over time. The first round of data may be confirming what you already know. That, in and of itself, is valuable—certainly better than being told you didn't have your finger on the pulse.*
- 3** Take the time to get clear about decisions you may need to make with the results of this evaluation. *The questions you can pursue over time can have real import for the way you strategically plan ahead. Your evaluator can be a critical partner in that work if you are clear yourself and if you have established transparent and ongoing communication with the evaluator.*



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