Take a Stakeholder-Centric Approach to Research

The road to results? Engage your stakeholders.

By Aurelia Aceves Hogan

Research and analysis aimed at refining your organization's strategy or programs is a key ingredient for success. Understanding your nonprofit's core issues – and learning about the communities you serve – will provide the clarity to ensure that your organization's mission and programs match reality.

Yet when many nonprofits embark on research, they conduct it in a siloed way. Only a handful of people – often leadership or a small group of consultants with a top-down view of the organization – carry out the work. Research and analysis can thus miss the mark, representing a narrow perspective of the work your team does.

In contrast, you can take a stakeholder-centric approach. Who better to drive this work and provide new knowledge than the people who live and work your nonprofit's mission every day? These stakeholders are your constituents and community, your board, and your staff.

Stakeholder-centric research for internal assessments and for program evaluations can evoke honesty about problems your nonprofit is experiencing. It's also a great opportunity for emotional engagement that can help stakeholders feel a part of the organization and advance your nonprofit's reliability and transparency. This, in turn, can fuel everything from increased funding to improved program participation to better employee retention.

Below, find six strategies for taking a stakeholder-centric approach to research and analysis.

1. Start with a strong foundation. Before launching any new research project, it's crucial to map out your goals and identify who your stakeholders are. Otherwise, you'll be navigating in the dark.

Ask and answer questions like these:

What is the vision and intended outcome of this research?

What kind of impact do we want it to have?

These questions will help you understand whether your research is internally-focused or whether the goal is to refine a program.

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Then, draw up a comprehensive list of stakeholders. This list should consist of people who engage in some real way with the vision, intended outcome, and impact of this research. From this list, you'll develop a core group who will be instrumental in the research and analysis. Whether evaluating your nonprofit's mission or a specific program, these people can include:

- ***the constituents and community*** that your nonprofit impacts
- ***your staff,*** from interns all the way up to the executive director
- ***your steering committee,*** such as the board
- ***any other stakeholders you can think of,*** such as ally organizations, funders, and grantmakers.

If your list of stakeholders seems overwhelming, consider using stakeholder categorization – in other words, group your stakeholders into categories according to how much interest and influence they have on the project.

2. Ensure equity. As you identify, categorize, and begin to engage stakeholders, make sure you're doing so equitably. To truly produce authentic, insightful results, you need a diverse range of inputs. Throughout the research and

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analysis process, ensure that you're being inclusive of *all* those who interact with your organization.

Be equitable not only in the groups you select but also the methods you use to engage them. Different engagement methods work better for different cohorts. So use as many different ways as possible to interact with stakeholders (for example, a variety of social media channels, phone and in-person discussions, e-mail, and so on) to ensure your research is done equitably and inclusively.

3. Develop robust research activities. Once the process begins, it shouldn't be rushed. There's a careful science to successful nonprofit research and analysis. First, determine the best methods for conducting your research: Surveys? Focus groups? One-on-one interviews? All three, and then more?

Your choice of methods will depend on your goal. For specific program analysis, a well-tailored survey could give you high-quality data and actionable conclusions. For a broader nonprofit assessment, a survey and a series of one-on-one interviews can help narrow your research, and then targeted focus groups can zoom in on specific aspects of your organization.

All research methods should have carefully plotted out timelines and logistics. Your methods and timelines should be tailored to the stakeholders you're working with. For example:

Are your constituents best surveyed online or in person?

Is your board more receptive to Zoom interviews or in-person interviews at a coffee shop?

Meanwhile, the questions that infuse your research methods should be a mix of broad and targeted. For organization-wide research, ask big questions, like:

Why does our nonprofit exist?

What impact do we have in the world?

Such questions will let your stakeholders expound on their feelings about your organization.

To focus on specific experiences, pair those broad questions with more granular ones, such as:

In your experience with program X, what worked and what didn't?

Why?

For a specific program assessment, spend time on the granular level to ensure actionable feedback.

4. Track your progress. As the research unfolds and your interactions with stakeholders continue, take stock of what's working and what's not. Use a set of metrics to keep you accountable. Metrics might include, for instance:

the number of stakeholders you interview

the volume and depth of data you collect from them

how the data can be applied in practice.

Along the way, understand that these metrics aren't static. They can and should be adjusted to meet your needs. For example, if you're getting an over- or under-representation from a specific stakeholder group, you may need to adjust your research or related metrics.

5. Take analysis seriously. Once the research is complete, the process is only half done. Now it's time to analyze the data you've amassed from your stakeholders. Start by cleaning and filtering the data – that is, removing any extraneous responses and categorizing conversations and their themes. From there, you can produce a first-draft analysis report and then scrutinize that analysis for any gaps. If there *are* gaps, your team should try to fill them in with additional research. Where gaps can't be addressed, be transparent. Explain why the gap persists and what its implications are for your findings.

As this analysis is taking place, make sure your stakeholders are involved. A core group should be instrumental in reviewing that first draft, identifying gaps, and planning further research.

6. Dispel myths. As you research and analyze alongside your stakeholders, don't fall prey to myths about the process. For example, many nonprofits may feel they can't burden their stakeholders by seeking information from them, especially stakeholders who are volunteers. In reality, engaging volunteers in this process can build trust and community. Your stakeholders want to be included – not excluded – in how your organization operates and evolves.

Research and analysis are essential to building a sustainable nonprofit – and stakeholder involvement is essential to research and analysis. By taking a stakeholder-centric approach, you'll hear directly from your most important audiences, in turn developing research and analysis that's rich, equitable, and easy to act on.

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For more on measurements, metrics, and stakeholder involvement, take a look at these articles at NonprofitWorld.org:

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Surveys Provide Crucial Feedback (Vol. 22, No. 5)

Using Your Outcome Measurement System (Vol. 18, No. 1)

How to Conduct Focus Groups (Vol. 17, No. 5)

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