Don't Overlook the Stakeholder Survey – a Key Tool for Success

Be sure you're meeting people's needs with this indispensable resource.

By Celeste Frye

A crucial tool that nonprofits often neglect is the stakeholder survey – a questionnaire to help you understand the people you serve. Without such surveys, you can stray from your mission and strategy.

Of course, conducting a stakeholder survey isn't as simple as dashing off a few questions and clicking "send." You need a plan to ensure you'll get the answers you need. Below, find four steps to creating your next stakeholder survey.

1. Do your homework.

Before getting to work on the survey itself, it's essential to have clear, concise answers to big questions like: ***What are the intentions of our survey?*** And, ***Who are our stakeholders?*** The answers will be your guiding stars through the rest of the process.

The first step is to determine the specific insights you're hoping to glean. For example, your goal may be to learn how you can effectively expand your programming. Or, conversely, your goal may be to determine what programming is superfluous and can be phased out.

Then, think about stakeholders who can provide insights that will support your goals. Make sure you understand their specific needs. That way, you can tailor the survey to them.

2. Craft it with care.

Think through the substance, word choice, and style of each question. Avoid broad and overly general questions. They won't capture useful data. Instead, carefully craft each question to be as specific as possible. For example, if you're a college or university, don't simply ask students, "How was your semester?" Instead, ask, "How did you find the quality of your science labs?" or "Did you take advantage of the writing center?"

Use language that's clear and accessible to your audience. It's easy to fall into a trap of using acronyms or jargon. Casual observers aren't as familiar as you are with the concepts you use every day, so take time to introduce each idea fully. Have a colleague or stakeholder review your survey for word choice before you release it.

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Also ensure you're crafting the survey with an open mind. Reaching conclusions before a survey is launched is a surefire way to fail. The point of a survey is to collect insight, not confirm assumptions. Surveys should be unbiased and free from leading questions.

It's not just the survey questions that need careful thought – it's the survey style, too. Survey flow should be tested multiple times for simplicity, clarity, and user experience so that the launch runs smoothly.

3. Take distribution seriously.

It's crucial to prioritize distribution. If you don't, your survey won't get into the right hands.

Make certain that you have effective and equitable distribution plans. Understand your stakeholders' preferred form of communication. If it's a younger audience, an app-based survey may work best. If it's an older audience, a web-based or paper survey could be a better option.

It's a good idea to make surveys available both online *and* offline. Don't assume everyone has internet access. For example, during a recent survey that Public Works Partners facilitated for the New York City Housing Authority, 30% of responses were pen-and-paper based.

Similarly, always consider your stakeholders' availability: Are they able to commit one hour to a survey, or just 10 minutes?

Another key distribution strategy entails partnership. Your nonprofit can partner with community organizations – from libraries to youth groups – to help distribute surveys. Nobody knows communities better than those who directly serve them.

4. Analyze your results.

Start analysis immediately after you launch the survey, not weeks or months later. At this stage, analyze how many people are taking the survey and how they're accessing it. This can yield helpful insight to drive better distribution.

Traditional survey analysis – that is, a close look at the answers themselves – should begin after the survey is closed to respondents. This analysis must be done carefully and with one or more team members versed in mid-to-high-level statistics. While basic statistics can provide basic findings, many helpful survey takeaways are visible through more complex statistical analysis.

Finally, use your analysis to make change. The whole impetus of a stakeholder engagement process is to gather feedback

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that can help your organization better meet its goals. So, use what you learn. Apply findings garnered through the analysis of feedback to make appropriate changes. And be transparent about this process. By showing you've followed up on the feedback you received, you build trust with your stakeholders and invite further conversations about how to best serve your community.

As you work on creating your strategic plans, be sure a stakeholder survey is part of your strategy. And don't rush: This survey may well be one of the most important parts of your planning. Using the tips above, you can ensure you're collecting rich data to better understand – and ultimately serve – your stakeholders.

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