

**The Secret Life of Surveys  
(the other things they can do for you)**

*Internet survey tools make it remarkably easy to gather and analyze information and opinion. But surveys can do much more important things than that in developing connections with stakeholders.*

Surveys can be scientific instruments offering statistically reliable guidance for important decisions. This article is not about that. It is about communication.

Your stakeholders are a critical resource. Engaging them meaningfully is essential to securing their loyalty, commitment and support. In fact, the first issue of this letter discussed why engagement is a major objective and benefit of nonprofit planning.

The most powerful tool in working with people, and especially in drawing them into your orbit, is listening. While a comprehensive listening-based *planning* process takes considerable time and effort, a *survey* can be used as a low-level maintenance dose of planning.

Listening and acknowledging are most effective when done person to person. This is why development departments have staff that travel to cultivate prospective major donors; college admissions departments have regional officers who visit high schools; and presidential candidates spend a lot of time in Iowa and New Hampshire every four years.

In a nonprofit there are plenty of opportunities for one-to-one contact among trustees, senior managers, staff, and *representatives* of various constituencies or stakeholders. In most organizations there are also larger groups of stakeholders with whom there is little direct contact—members, users, subscribers, patrons, guests, alumni, parents.... The interest, support and enthusiasm of these constituencies can be vital to the sustained vitality, or even viability, of the organization.

The two primary means of assuring satisfied stakeholders are (1) providing programs and services of the highest quality, and (2) making stakeholders feel that their opinions and concerns are important to those in charge. And not necessarily in that order.

Since senior leaders are not likely to be able to meet with or telephone each stakeholder individually, a well-crafted survey can serve to establish a baseline level of communication. Unlike a newsletter, or other one-way means of communication, which may or may not be read, a survey offers many advantages:

- **Goodwill:** The very notion of a survey is premised on asking rather than telling—always a good start for communication. The simple act of asking stakeholders for their opinions and ideas creates good will.
- **Engagement:** Simply by answering, responders are taking an active, if perhaps small, step into participation in the organization. If the survey is part of a planning process, it prepares stakeholders who might not otherwise be engaged for their sense of ownership and support of the plan once it is complete.
- **Consensus:** By participating, they are, to some extent, buying in to the objectives on which they are commenting.
- **Shaping perception:** This must, of course be done convincingly. A good survey does not merely ask for free-ranging opinions and preconceptions. “Do we have the right mission?” or “How do you like x, y or z?” are not likely to offer useful insights or convey to stakeholders that they are being taken seriously. However, a survey can frame questions to inform stakeholders and adjust perceptions as they respond—e.g. by asking for ratings of importance of, and satisfaction with, specific programs, services, or aspects of mission.
- **Evaluating communication:** Beyond informing stakeholders about the organization’s values and accomplishments, it is also important to find out whether messages are getting through, and what kinds of communications work for various purposes and audiences. While survey responses may affect programs and services, sometimes feedback simply indicates where you aren’t communicating very well—either about achievements or about the importance of them. If you ask about issues at the core of your mission, and you get answers that surprise you, there are

three possibilities: needs may have changed, your mission statement may need to be revisited, or you may need to refocus your communications to better educate your stakeholders.

- **Segmentation:** Perceptions may be very different among different demographic or geographic subgroups of stakeholders, or across other categories (roles, duration of connection, interests). A survey may give you some very clear information about the perceptions of, or what you need to do better for, or communicate more effectively to, subgroups you may not have thought about independently.
- **Support:** By means of all of the above, a survey can help to prepare stakeholders to contribute more generously to fundraising efforts.

We have often heard nonprofit leaders say that they did a survey a couple of years ago and don't want to impose on their stakeholders again so soon. This hesitation is based in a misunderstanding. The old, long paper survey—or the commercial online customer service or market research survey that has 17 questions on subtle distinctions that you didn't notice and couldn't care less about—could indeed be an annoyance or a burden. But if you are surveying stakeholders about an organization with which they have already developed some level of commitment, and you are using simple online tools, the rules are different. If your surveys are reasonably brief, and if they seem meaningful, annual or even more frequent surveys can be an asset.

One measure of how well received surveys can be is response rate. In membership organizations we have often seen online response rates of 60%; among parents in independent schools typically we get a rate above 70%. These rates are at least twice as high as those likely to be achieved with paper surveys.

In order for these objectives to be achieved, surveys must be carefully constructed and analyzed, and the organization must report back to the participants about voices heard, as well as lessons learned and actions taken from them. If the organization fails to report back to stakeholders messages heard, lessons learned, and perhaps misconceptions clarified or little

known facts conveyed, the net effect of a survey will be to reduce, rather than increase, the sense of transparency and responsiveness.

The value of these ideas about surveys can be corroborated from another perspective. While surveys play a very different role, they share a good bit with the phenomenon of social media in terms of the critical importance of engaging stakeholders.

***For tips and tools, see the web version of this letter.***



Contact Sam Frank  
to discuss the possibilities.

#### **Need just a little help?**

We'll work with you to create effective surveys, refine governance practices, facilitate—or just plan—a retreat, develop an action plan, define effective metrics, or think through the optimal planning process for your organization.

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## **Resources**

### **Other Critical Issues**

- CI 1: Why Plan? (<http://bit.ly/SyPci01>)
- CI 4: On Boards (<http://bit.ly/SyPci04>)
- CI 5: The Structure of Planning (<http://bit.ly/SyPci05>)
- CI 6: Financial Modeling (<http://bit.ly/SyPci06>)
- CI 7: On Mission (<http://bit.ly/SyPci07>)
- CI 8: The Measure of Success (<http://bit.ly/SyPci08>)
- CI 9: Brand Identity (<http://bit.ly/SyPci09>)
- CI 10: Mind Your RFPs & Qs (<http://bit.ly/SyPci10>)
- CI 11: Integrated Planning (<http://bit.ly/SyPci11>)
- CI 12: Business Planning (<http://bit.ly/SyPci12>)
- CI 13: Facility Planning (<http://bit.ly/SyPci13>)
- CI 14: Managing Change (<http://bit.ly/SyPci14>)
- CI 15: Strategic Action (<http://bit.ly/SyPci15>)

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