



Customizing Research for Your Strategic Plan

Learn to use data to build a strategic plan
and shape your vision for future impact.



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Here's what we know:

You need to tell a story about your *current* impact that helps people understand the vision for your *future* impact. In other words, you need data that can help you build your strategic plan. But this kind of data isn't necessarily the obvious set of questions you'd ask in an intake survey or exit interview. You have specific questions about the cares, concerns, and long-term needs of the people you want to serve.

Among the many big questions data can help answer or clarify is the question of membership. Not merely demographic questions like, *Who's showing up*, but *What are their needs? Why are they coming to this program or this organization, and what will keep them coming?* This kind of information is essential for building a strategic plan because it doesn't map the effectiveness of just what you're currently doing but also what you might do in the future to keep expanding. This kind of research can be hard to undertake because you might not even know what kinds of questions you *could* be asking.

Springtide can help. We've already helped tons of mission-driven organizations design and execute custom surveys and research to help them brainstorm what they need to know, design research that can help them get answers, and then put that data to strategic use. So we know what steps you need to take **before**, **during**, and **after** you start thinking about custom research and surveys.

1 BEFORE: Using Data for Strategic Planning

2 DURING: Designing Research for Trust

3 AFTER: Getting High Participation

A Case Study in Program Evaluation

Let's start with a story.

Springtide was hired by an large organization with national reach. The client came to us because the last time they collected any information about the people they serve was in a survey 15 years earlier. The world has changed significantly since that time, and this client knew they were not only failing to respond to the most up-to-date concerns of their audience but also lacking an accurate picture of **who** they were serving now and what those people cared about most. Though this client knew that their membership had changed significantly over time, they didn't know how to begin measuring it—especially since they had members all over the country. Because their reach was so much more significant now, they couldn't just reuse the same survey from 15 years prior.

A Case Study in Program Evaluation (continued)

And even if they had a plan for a new survey, the logistics of distributing a national survey was more than they could manage in-house. This kind of undertaking also meant they needed to think bigger than just a few demographic questions: if they were going to invest in a national survey, they needed to know they would receive data that would help inform strategic planning. What did they need to know in order to better understand those they were serving?

Maybe you'll recognize their concerns as obstacles, worries, or questions you've run into in your own need for custom research and surveys:

- They do not know what questions to ask to get the information they want.
- They need to reach a wide range of participants located all over the country.
- They do not have the capacity to conduct a study at this level.
- They need data to inform strategic planning.
- They want to better understand those they serve.



STEP 1: BEFORE



Using Data for Strategic Planning

The client knew that in order to create a strategic plan for the near future of their organization, they would need a smart starting point. They began by considering what they would need to know in order to make decisions. The leaders of the organization are thoughtful, progressive, and compassionate, but they are not researchers by trade or training. They knew that in order to truly serve their audience in a cohesive and structured manner, they would have to be mindful about collecting the right information, and in the right way, from their members. A national survey that gathered good information in an organized way would be the key for making future plans for the organization. They sensed how important it was to get this step right but didn't know where to start.



The Springtide Insight: Don't Get Stuck on a Single Data Point

Most of the strategic plans organizations have intact when they come to us are neither strategic nor actual plans. Instead, they are a set of loosely connected initiatives or priorities for the organization. In our experience, the reason organizations often find themselves in this middle ground between having a good, cohesive strategy and a loose set of tactics is because they lack a structured way to think about the data they have collected.

Without people who can make sense of how multiple data points fit together into an overall story about what is happening in the world — what academics call a *theory* — people tend to get carried away by a single data point at a time. Wrapped up in the single story that a particular data point might be able to tell, they create a list of action items based on that point and call it a plan. While this might seem like *using data to build a strategic plan*, it's actually a counterfeit. And worse, it's ineffective and will likely cost your organization time, effort, energy, and money. Because as the execution of plans built on a single data point draws near, leadership will only be able to show a few checked boxes rather than forward movement and growth in expansive, collective ways.

But there's a way to use data the *correctly* so that it really works strategically. It all starts with the questions you ask at the very beginning of the project. We work this into our **Objective Mapping** process. The answers to these questions not only serve

as a way to keep the project within scope but also provide the analytical framework for making sense of the data and informing key initiatives for the overall strategy.

From there, individual tactics can be developed that address a particular objective, but *only* if those tactics and data points group together under a particular objective. If a data point stands out but is not supported by evidence, then it either is an outlier or requires further investigation. Discovering outliers can be helpful in determining what kinds of questions need to be asked in a custom survey. The stray data may need to be further explored or it may need to be ignored while more nuanced questions are asked about a data point that can get to the objectives.

Including data in the strategic plan development process is crucial because it provides some justification for what is being done, guards against internal biases, and helps people get on board with change. Data should be a significant piece of what informs strategy; however, it should not be the sole piece of information considered. An organization's mission and vision are also critical pieces of the conversation.



Designing Research for Trust

The client we were working with on membership research knew that in order to get the information they needed, they'd have to speak to and connect with thousands of people. This project, and the research that came out of it, would have tremendous reach and visibility. They wanted their membership—the very people they were hoping to survey—to feel like they had some stake in this research, a real voice in what needed to happen in the future to make their experience (and the organization) better. Our client knew that in order for people to feel heard, they had to use accessible, inclusive language that would assure people that they were being listened to. But communicating a sense of welcome and invitation, and encouraging members to feel they have real stakes was a lofty goal—especially since survey design and research wasn't their main skill as an organization. Springtide helped them design a communication plan to articulate to anyone they wanted to reach that they were committed to truly understanding *all* of their members or prospective members from beginning to end of the research process.

The Springtide Insight: Lay the Foundation in the Process

Any research process is essentially an effort at changemaking. You want to collect data to help inform the direction of your organization or program. Unfortunately, too many people overlook a critical aspect of changemaking: the process of researching itself.

The research process *itself* has huge potential in laying a foundation of trust upon which future changes can be built. Ignoring this process is a common (and tragic!) mistake. The research process itself—and not just the data it yields that leads to changes—is imperative for building this foundation of trust. And conversely, if the research process isn't undertaken thoughtfully, it can actually be damaging to relationships with important groups inside the organization and doom any efforts before research even really gets started.

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- 1 Voice(s) matters.** Even if you think you know what everyone wants and needs in your organization, stakeholders need an opportunity to contribute to the research scope. For us, this comes in as we conduct our Objective Mapping process. Collecting a comprehensive list of stakeholders who need to be interviewed or invited to a focus group might take a little more time on front end, but it is critical to ensuring that your biases, both known and unknown, don't infiltrate the research project and skew the results. Additionally, if handled well, you get an opportunity to remind stakeholders that they are both important *and* embedded in a larger organization or community where all voices are important.
- 2 Be inclusive.** Data collection efforts should be as inclusive as possible. You really do need to hear from as many different groups as possible. The simple rule that we follow is that if you don't invite people into the data collection process, you really have no right to use that data to make decisions that impact them. Of course, you can try, but those decisions probably won't be met with much enthusiasm. This is especially true for groups that have been historically marginalized, disregarded, oppressed, or worse.
- 3 Adopt a values-based communication plan.** We've assisted on hundreds of research projects and have found that most communication efforts from leaders fall into one of two categories. The communication plans are either *non-existent* or they are *transactional* in nature, simply encouraging people to take a survey or join a focus group. Both of these approaches are damaging. Instead, leaders should work to implement a comprehensive communication plan for the duration of the project that reflects, affirms, and reinforces the organization's values at every opportunity. Even encouraging people to fill out a member survey is an opportunity to remind people *not only* about your values of listening and being inclusive (and whatever other values you aim to communicate in the very design of your survey) *but also* where those values are rooted: in your very mission and at the very core of your organization.

The research process can and should help you lay the groundwork for building trust and getting buy-in, which will serve your organization *and* members when the time comes to take action based on the data you have collected. The simple steps above are a good place to start.



Getting High Participation

The client from our ongoing case study was concerned about participation in the survey and interviews—and understandably: they were putting considerable effort into a national survey that would not only give them needed information about their strategic plan but also help them communicate their organization’s values and gain buy-in from members. They wanted this research to be an opportunity to be transparent with their members, letting them know that all the information they shared would be used to better the organization they believed in. This organization wanted members to know that they were contributing to the change they wanted to see. But how could the organization make sure this invitation to participate in meaningful ways was received well? How could they make sure all their efforts were met by motivated members?

We helped the client understand how to incentivize in-person participation at a national conference and how to encourage people to be a part of this important research. Wanting participants to feel heard, seen, and understood, the client leveraged the data collection in a very public, very visible way in an effort to make members feel like they were in on the greater plan . . . because they were!



The Springtide Insight: The Four I’s for Increasing Response Rates

If you’re going to invest the time, energy, and money to undertake a custom research project, you want to make sure you get the biggest bang for your buck. Similar to the client we profiled in the case study, you want to ensure that the data you’re collecting will be robust, useful for years to come, and informative for immediate decisions and long-term strategy.

In order for your research to meet all of those objectives, you must work hard to ensure that you have as many people as possible participating in your surveys, focus groups, interviews, and all other forms of data collection. This is what researchers refer to as a *response rate*.

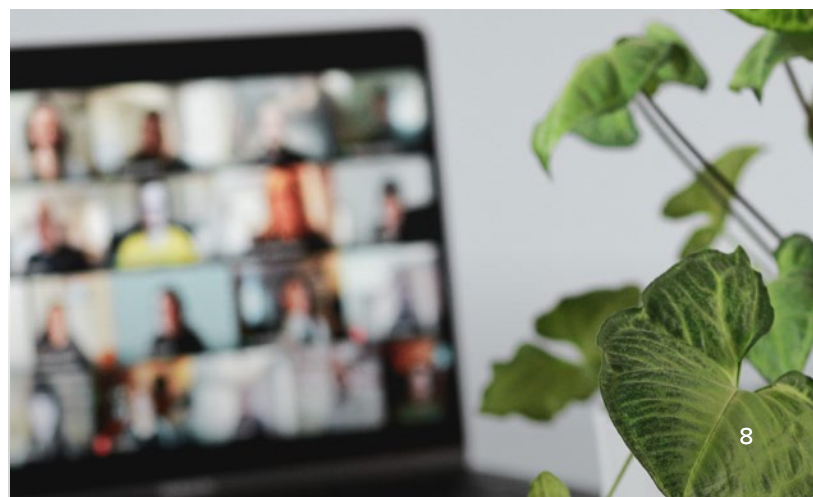
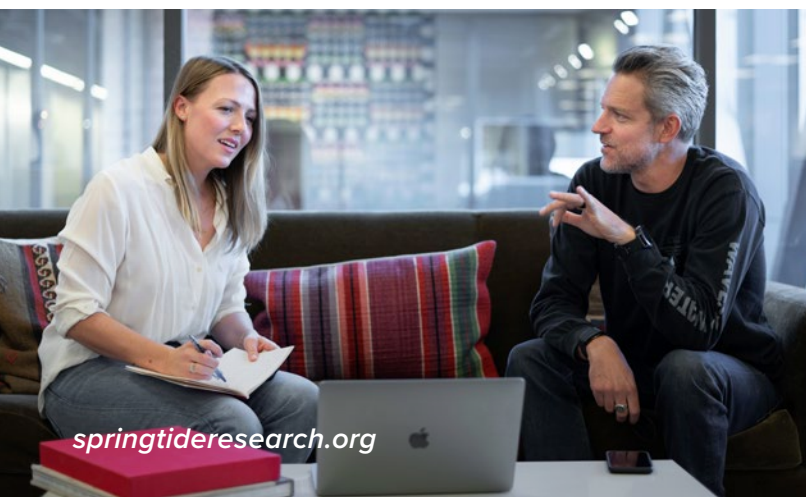
There are some simple things you can do to increase your response rates. Employing as many of the following strategies will increase not only your research validity but also your member trust.





Here are the most important things to be thinking about in regard to response rates:

- 1 Investment:** Response rates go up when people see themselves as being invested in the organizational outcomes of the research. For example, a teacher is more likely to respond to a survey if it is about their school. A teacher is less likely to respond to a survey they get from a national teacher's association and *even* less likely to respond to a survey from a tire company—even if they just purchased tires. Make sure that you're working hard on your communication plan and research design so it's clear how people's responses will impact their experience or concerns in the organization moving forward.
- 2 Inclusion:** Response rates often suffer because organizations do not make an explicit effort to include groups and subgroups of people who share a common identity and affinity. Without pandering, be sure you're reaching out to groups that might normally be left out or underrepresented. This is especially important if these groups have felt marginalized or dismissed in the past. Make a special effort to meet them in ways that are convenient and accessible for them.
- 3 Intentionality:** Lay out a clear plan from the very beginning that lives on a website where people can learn about the *why* of the research effort, see exactly *when* they'll be able to view high level results or findings, and understand *how* the information will be used to inform organizational decisions. Update the website regularly with progress and any new information about impacts to organizational strategy, mission, and vision. Although the connection between data and decisions may be clear in your head, do not assume that it is clear for others. Lay out those connections intentionally. This will help people feel invested *and* included.
- 4 Incentives:** Finally, think about incentives you can offer to entice people to participate. Incentives work best when either everyone gets something small or a few people get some larger items. Incentives can quickly break a budget, so it's helpful to think about things you already have on hand that people would find valuable. In the past, we've seen free conference registrations, free webinar subscriptions, and organizationally branded merchandise giveaways all work as effective, low-cost incentives.



Conclusion

Data gaps that require custom research can be intimidating. It can be hard to know where to start and how to be smart about the process.

BEFORE Think strategically about collecting data for your strategic plan by taking steps to avoid getting too attached to single data points early on. Make sure you're building something based on the *big* picture.

DURING Don't neglect the opportunity to use the research process itself to reinforce your organization's values—including your commitment to inclusion and listening. This will help with buy-in, not just for survey participation but also for the long-term changes that might come out of the research.

AFTER After all the work of building a custom survey, use the *four I's* to ensure the best response rates possible: investment, inclusion, intentionality, and incentives.

Using some of the principles laid out in this white paper, our client was able to demonstrate that they have a vested interest in their audience and members. They gathered important information that helped them keep a pulse on the needs and values of their current membership as well as develop a strong strategic plan. They used the *process* of collecting data to remind members about the organization's values and increase buy-in and participation, not just in the survey but in the whole mission of the organization.



You can easily implement these same tactics in your own organization. If you need any help doing so, don't hesitate to be in touch. Email Megan Bissell, Head of Research for Springtide Research Institute: megan@springtideresearch.org

Custom research for mission-driven organizations.

Move your organization forward, confidently.

Springtide offers custom research to help you learn more so you can do more.

Our research services include program evaluation, grant support, custom surveys and data collection, and more. In addition, Dr. Josh Packard is available for presentations on Springtide data or the custom research you commission.

Contact Megan at megan@springtideresearch.org for more information. If you haven't already signed up to receive our other three white papers directly to your inbox, visit springtideresearch.org/custom-research to sign up.



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