

Technical notes about implementing the stakeholder engagement survey for the Wilder Foundation

Project purpose

In 2011, staff from the Amherst H. Wilder Foundation's Office of Resource Development (ORD) contracted with Wilder Research to survey past and current donors and volunteers and individuals who have attended Wilder Foundation-sponsored events. The survey was designed to help the Wilder Foundation learn more about the individuals who have a connection with the organization. The combined results will help the Wilder Foundation develop better communication strategies about programs and services.

This document outlines the tasks completed to develop and implement the survey and process and analyze results, and present examples of how the data will be used. This report is intended to be used as a guide for future replication of the survey.

Research methods

Survey development

To design the stakeholder engagement survey, Wilder Research staff worked with ORD staff to identify the most important characteristics of stakeholders' beliefs, behaviors, interests, and demographics. In addition, research staff consulted literature and websites about stakeholder and donor surveys. The information was incorporated into a survey that asked about respondents':

- Level of interest in a variety of issues related to a strong, healthy community
- Participation as a volunteer with nonprofit organizations
- Contributions to nonprofit organizations, including types of organizations and motivation to donate
- Preferred methods of communication from or with nonprofit organizations
- Familiarity with the Wilder Foundation and specific programs
- Participation in Wilder-sponsored events
- Volunteer experience with Wilder
- History of donations to Wilder, including reasons for making single or multiple donations
- Demographic information

The final paper version of the survey was eight pages long and had 42 questions. The printed version was mailed to the sample list and used for phone surveys. Once finalized, the survey was programmed into the Computer Aided Telephone Interviewing (CATI) system for the web surveys. The survey is included in the appendix.

Sample

This survey was designed to be completed by individuals connected with the Wilder Foundation in a variety of way. Sample information, including contact information, was provided by ORD staff.

The original sample of 7,401 individuals included:

- Individuals in the Raiser's Edge donor management system from the ten county area who have made a contribution and/or attended an event and/or volunteered.
- Individuals who were added to the database since 2007 and have never made a gift and/or volunteered and/or attended an event. This includes people who have somehow expressed an interest in Wilder through staff contact or the website.

The complete list excluded all current and former employees, funder contacts, contractual relationships, Shannon Alumni, research clients (unless they were identified as donors, event participants, or volunteers), and anyone who had requested no contact by phone.

Research staff reviewed and cleaned the mailing list by removing additional employees and retirees that were not removed in the first filter. The mail house received a list of 7,284 potential respondents and removed sixteen names that did not have a valid United States address, for an ultimate sample of 7,268 people.

Survey implementation

To increase the number of individuals responding to the survey, Wilder Research implemented a multi-step survey approach. To begin, a postcard was sent to the entire sample list of 7,268 individuals in late January 2012. The postcard briefly explained the survey and provided individual log-in information for a web survey as well as a phone number for asking questions or responding by phone. The postcard was followed three weeks later by a mailed introductory letter and survey to 7,124 individuals who had not responded. Finally, about three weeks after the letter was mailed, each of the 4,178 non-respondents was contacted by phone. In most cases, a message was left asking people to respond by phone, mail, or web.

In total, 1,056 surveys were returned, which accounts for 14.5 percent of the sample. Four hundred and thirty-one were returned via web (41%), 574 by mail (54%), and 51 were completed by phone (5%). Less than one percent refused by mail or web or could not be reached due to bad contact information.

Paper surveys were collected via mail until May 15, 2012. Phone and paper surveys were proofed for inaccuracies such as non-response answers, incorrect question skip patterns, and double entered answers. These answers were included or discounted based on correct skip patterns and whether the proofer could discern a respondent's intended answer. For example, some respondents checked two boxes for the same question when it was required to only check one box.

If a respondent crossed out one of the boxes or circled a box, it was determined that the proofer could discern the intended answer and it was included in the survey responses.

A code book was developed for open-ended and "other, specify" questions based on one-third of the completed surveys. All survey questions from the paper and web surveys were coded according to the code book. Once coding was completed, the paper surveys were keyed in preparation for data analysis.

During the coding process, the following three open-ended questions were identified as having rich qualitative data that would be useful to development and communications staff for future planning.

- Why have you chosen not to make a repeat donation?
- Please describe any other way you have been involved with the Wilder Foundation.
- What is the one thing Wilder can do to deepen your connection with the work of the organization?

The responses to these questions were coded for data processing, but they were also word processed, edited, and sorted so that ORD and communications staff could read the full text.

Data analysis

Once all the responses from the paper and phone surveys were entered, the data were combined with the surveys completed via web and cleaned. The cleaning process included checking for survey completion; applying variable and values labels; performing quality tests on the value ranges of the variables and looking for any outliers; investigating missing values; removing any incomplete, incorrect, or inaccurate data; and removing duplicate surveys. These steps ensured the data were ready for analysis.

Data analysis staff used the Statistical Package for Social Scientists (SPSS) to run frequencies and means on all variables, including the codes for the open-ended responses. The initial data run provided the opportunity for research, ORD, and communications staff to look at the data and identify questions for further exploration.

The next data analysis step involved creating composite variables based on respondents' involvement. For instance, respondents were divided by giving and volunteer participation and cross tabulations were run for each variable in an effort to better understand the characteristics of those groups.

ORD and communications staff were provided SPSS printouts and future analysis will be based on their needs and requests.

Using the data

The purpose of this research effort was to help the Wilder Foundation learn more about the individuals who have a connection with the organization. Communications and ORD staff are using the results to help develop strategies for communicating about programs and services and engaging stakeholders with the organization.

Specific ways the data are currently being used, or will be used in the near future, include:

- Identifying communication strategies to increase constituent awareness and understanding of Wilder's programs and services
- Identifying cultivation strategies to improve donor retention
- Using internally to make the case for strategic, affinity based fund raising appeals – especially with volunteers
- Determining potential audiences to target acquisition efforts

Wilder Research

Information. Insight. Impact.

451 Lexington Parkway North
Saint Paul, Minnesota 55104
651-280-2700

www.wilderresearch.org



AMHERST H.
WILDER
FOUNDATION
ESTABLISHED 1906

Here for good.

For more information

For more information about this research project, contact Laura Martell Kelly at Wilder Research, laura.martellkelly@wilder.org or 651-280-2667.

Authors: Laura Martell Kelly

October 2012