Develop & Launch Your Own

Sea Change Insight Panel™

A STEP-BY-STEP WORKBOOK

Organization:

Name:

Date:

Sea Change Strategies

The Sea Change Insight Panel™ is a hybrid research and cultivation initiative that offers monthly opportunities to gather actionable insights from donors while making them feel heard and valued.

Similar to customer communities that are frequently a core engagement strategy for major for-profit brands, Insight Panels help nonprofits benchmark donor loyalty, test messaging and gauge attitudes toward issues of concern, with the goal of boosting the efficacy of the overall fundraising program.

We've developed this workbook so you can DIY it. And if you need extra support, you can also reach out to Alia and Mark at Sea Change Strategies at info@seachangestrategies.com.

Introduction

Why Listen?

You pay attention and care—so you've likely experienced this yourself.

Something happens. A family diagnosis, a hurricane, a Supreme Court ruling, an election… You make a donation to an organization you think can make a difference.

The organization sends you an auto-responder thank you email, a newsletter a few times a year, alerts telling you to take urgent actions (and now!) and many more direct mail appeals. It feels like they are talking "at" you. Your compassion feels one-sided.

Pretty soon you unsubscribe. You recycle the letters. And you occasionally glance at the newsletter. If you're really committed, you put up with it, but wish for something more.

What you hoped would be a conversation is instead a never-ending monologue.

Here's an undeniable fact: As a nonprofit fundraiser, you are in a relationship with your donors. We all know that relationships with poor communication tend to be short-lived, yet many nonprofits only engage in monologue. No wonder 75% of new donors give once and then never give again.

We spend countless hours on messaging strategy, pay PR firms to help with our logo and tagline and pore over every word in our direct marketing appeals. Of course that matters, but it's not enough. That's the monologue. To build a solid relationship, you must shift into conversation. But how?

Chances are you've been invited to join a customer community for an airline or a bank or a store you love. The benefits of these communities are two-fold: the company deepens connections with customers with an aim of building loyalty and word of mouth. And they keep their fingers on the pulse of their best customers: what they like, what's important to them right now, and what they expect.

Know why Starbucks has free Wifi? They asked their customer community what would make the biggest difference in their in-store experience and free internet access was the overwhelming answer.

Anthropologie asked their customer community about holiday shopping habits and, based on feedback from members, started in-store Holiday Pop-Up markets where customers learn crafts and enjoy seasonal treats.

In 2018, Sea Change Strategies set out to duplicate that model for nonprofits with a particular focus on two high value and, ironically, often neglected groups: monthly and midlevel donors. We launched our first Insight Panel with the National Audubon Society in February 2018. Now in its fifth year, the Insight Panel consists of more than 5,000 donors. Today we run similar panels for Best Friends Animal Society, the ACLU, the Wilderness Society and Doctors Without Borders, among others.

Through the Insight Panels, these organizations have shifted from monologue to conversation.

Insight Panelists have shared stories of wonder and discovery and occasionally heartbreak and anger. They have shared their experiences navigating the challenging terrain of the pandemic, the murder of George Floyd, the 2020 election and the war in Ukraine. They've provided important feedback on campaigns and content. And they have surfaced donor concerns and complaints so the organization can address them quickly.

"Going to a natural area to bird was salvation for my husband and me. We could be out of the house doing something we love while still being safe. Birding in nature has kept us sane."

– Audubon Insight Panelist at the height of the pandemic

"I'd like Best Friends to give us some good talking points to use when friends want to buy a companion animal from a breeder instead of adopting from a rescue organization. I know the usual spiel but that doesn't often work."

– Best Friends Animal Society Insight Panelist

So what's in it for the Insight Panelists? They get an opportunity to be seen and heard by a cause that is dear to them. Listening, it is said, is an act of love. They also get a monthly report back with highlights of the prior month's survey results. And increasingly, they get a sense that their voice matters.

The aim of this guide is to put the power of listening in as many fundraisers' hands as possible. It contains the recipe we have used successfully. Launching and managing a donor Insight Panel is not easy, but it's also not rocket science. It takes genuine curiosity about your donors, a disciplined approach, time and energy and perhaps most importantly a willingness to be changed by what you hear back.

Here is the recipe. The rest is up to you.

DIY STEP-BY-STEP

Phase I: Start with strategic decisions.

Here are five strategic decisions you'll want to make first.

1 Set your goals.

What is the purpose of your Insight Panel?

What do you hope to accomplish by actively listening to your donors?

Some ideas are:

- Increase donor loyalty and upgrades to higher levels of giving
- Provide key insights to development, marketing/communications and programs teams
- Create a felt experience of community
- Co-create content for sharing with the broader donor community
- Provide an additional stewardship touchpoint to engage donors in your work

What goals do you wish to accomplish?

2 Determine your metrics.

How will you measure success for each goal?

Some ideas are:

- Retention rate of Insight Panel participants
- Percentage of donor upgrades from Insight Panel participants
- Insight Panel participant Net Promoter Score® change [See analysis section for details]
- Insights utilized by development and marketing/communications programs teams

What metrics will you track?

3 Decide who you want to recruit.

What segments should be invited to participate?

Here are some key takeaways to consider as you think through which donor segments you wish to include:

- The Insight Panel is an online initiative so we suggest starting with emailable donors.
- We typically invite high-value donor groups, including midlevel donors, monthly donors, loyal donors (3+ years) and planned givers. These donor segments represent the highest value to the organization *and* often engage with the Insight Panel at higher rates than other segments.
- Some groups have had success recruiting new grassroots donors (within the last 12 months) with a goal of seeing what differences, if any, exist between newly acquired donors and steadfast supporters.
- Some groups have had success recruiting midlevel prospects to the Insight Panel and leveraging their participation to upgrade them into midlevel.
- Lapsed donors, non donor activists and niche segments of donors that number less than 500 are important to your program and merit a one-time annual survey to gauge attitudes, but aren't great candidates for an Insight Panel. Lapsed donors and non donors typically disengage over time. And segments of donors numbering fewer than 500 don't provide statistically significant or even directional data.

What donor segments will you invite?

4 Outline actionable research and engagement objectives.

What do you want to learn from your donors?

Knowing what kinds of information you want to glean from your panelists broadly can help you and your team home in on specific questions for your monthly probes. (We'll go deeper into this in the tactical section.)

Some areas of inquiry might include:

» **How do donors feel about emergent programs and priorities?**

Organizations often test emerging campaigns and priorities with their Insight Panels — especially how salient those campaigns/issues might be for fundraising. Panel participants provide key feedback and/or early warning signs if programs/priorities feel out of sync with their perception of the organization.

» **How are donor attitudes shifting based on current events?**

Tracking donor feelings and attitudes can be especially important during major events and crises like the pandemic or election cycles. Probing how donors are responding to current events is a rich area of exploration and organizations can respond by adapting messaging to better reflect donors' feelings and expectations, almost in real time.

» **How do donors respond to specific fundraising offers and what is their overall perception of their donor experience?**

You can also leverage the Panel to ask donors about their donor behavior and how your organization can better meet their needs with giving options—but do it judiciously so panelists feel like it's part of the process, not the purpose of the process. Potential areas of focus here might include monthly giving, memorial giving, merchandise, benefits, and readiness to upgrade.

» **Are donors aware of, and/or how do they respond to, specific collateral?**

We often give Insight Panel participants an opportunity to weigh in on collateral in development. This provides key feedback while also making participants feel special as insider VIPs. We also track awareness of collateral, and use the Insight Panel strategically to ensure these important donors see assets they might have missed otherwise.

4 Outline actionable research and engagement objectives. *(continued)*

» **How can your team get to know donors even better?**

The Insight Panel is also an opportunity to foster connection by letting donors express themselves personally and creatively. We often ask participants “getting to know you” questions that aim to strengthen their relationship to the organization and provide insights into who they are as people, which can in turn inform engagement opportunities (photography contests, book clubs, etc…). Some questions may include:

- Share photos and personal stories that connect with the organization’s mission (pets, species, trips/wild places).
- Share local wins that have you inspired to keep going.
- Share global wins/leaders that have inspired you.
- What books/movies have connected you more deeply to this issue?
- Share your wisdom: How do you stay hopeful and resilient in the face of big challenges?

What types of questions do you want to prioritize?

5 Convene key internal stakeholders and define roles and responsibilities.

Who needs to be involved and how?

Having buy-in and a clear understanding of roles and responsibilities is crucial to the success of your Insight Panel. At this stage, you also want to make sure your team is aligned on the goals, metrics, segments and research/engagement objectives you've outlined above.

Who are the key stakeholders you need to convene?

What's your Insight Panel's DARCI chart?

For more on DARCI, see appendix A for a resource from the Social Transformation Project.

Decision maker: Who has final approval and veto power?

Accountable: Who is the single person responsible for making the Insight Panel happen?

Responsible: Who is responsible for doing the work? (there could be many stakeholders here.)

Consulted: Who might have valuable input?

Informed: Who needs to be kept apprised of relevant developments?

DIY STEP-BY-STEP

Phase II: Make your tactical plan.

Now that you have your strategy in place, here are three tactical steps you'll need to make.

1 Plan your recruitment cycle.

You already have your donor segments chosen (see number 3 in the strategy section). Now, you need to invite those donors to join the Insight Panel.

We recommend sending three email invitations (about two days apart) that clearly set the following expectations:

» **What is an Insight Panel?**

"We're launching a special Donor Insight Panel so we can actively listen to your thoughts, feelings, and ideas and take action on your feedback so we can align our priorities with yours."

» **Why are you inviting this donor to participate?**

"You are a dedicated supporter and we care what you think."

» **How does it work?**

"We'll send you a monthly survey that should take no more than 5 minutes to complete."

"We ask you to try to commit to participating for at least a year (but you can opt out at any time if necessary.)"

"Each month, we'll report back what we learn from the previous month's survey."

The recruitment series should link to your first survey. We recommend your first survey include the following questions/prompts:

» **Begin with an "opt in" question.**

"Please provide your first and last name and preferred email below to sign up for the Donor Insight Panel."

» **Make the first survey ALL about the donor.** This one should be fun for them to complete. Some ideas:

- Submit photos/stories that align with the organization's cause, if applicable (e.g., pets, wilderness, global travel, family)
- How they got involved in the cause
- What burning question they have for the CEO
- Basic demographics

Do not land your survey on a donation page. The landing page should go to a video or another piece of engaging content. You want to avoid the mistake of conflating the Insight Panel with direct fundraising asks. Many of our clients make it an ironclad policy to refrain from soliciting for gifts via Insight Panel communications.

1 **Plan your recruitment cycle.** *(continued)*

When will you launch your recruitment cycle?

What content will people land on after taking the survey?

What questions will you ask?

2 Plan your listening cycle.

We recommend developing a quarterly calendar of survey topics that focuses on a key area of interest each month. Remember to refer to the actionable research/engagement objectives you outlined for inspiration (see number 4 in the strategy section above). And stay open to emergent issues that may argue for deviating from the plan—e.g., a Supreme Court decision, a natural disaster, or anything that may be commanding donors' attention.

As you consider your topics/questions, we recommend the following:

- **Vary the length of monthly surveys** and keep the time to complete the survey around 5 minutes. This is about 4 questions.
- **Offer a mix of open and closed ended questions.** Closed ends make the survey easier for participants to complete and can be quantitatively analyzed. Open ends can help you understand the language donors use and can shed light on why donors feel a certain way.
- **Aim for a mix of question types** that both aim to strengthen relationships with participants and to obtain substantive information about issues and donor experience.
- **Always end with an open-ended question** that asks, "Is there anything else you'd like to share with us today?" You'll get rich responses to this question after donors are warmed up, and it's an effective way to surface individual concerns and complaints.
- **Land your survey on engaging or inspiring content.** Do not land the survey on a donation page.

2 Plan your listening cycle. *(continued)*

What will your first quarter of content look like?

Month 1	Month 2	Month 3
Research/Engagement Objectives:	**Research/Engagement Objectives:**	**Research/Engagement Objectives:**
Questions:	**Questions:**	**Questions:**
Landing Page (special content post-survey):	**Landing Page** (special content post-survey):	**Landing Page** (special content post-survey):

3 Plan your feedback cycle.

You've got responses! Now you get to report back to your Insight Panelists what you learned. After your initial recruitment cycle, we recommend sending two emails each month that serve a two-fold purpose: 1) summarizing what you learned the previous month 2) linking to a new survey topic. We go into detail about interpreting data in step three below, but here are some initial considerations:

- Incorporate user-generated photos and give shout outs to specific participants for sharing them (if you've asked for permission in advance, which we like to do).
- Remind them of the topics discussed and show them you're listening. "Last month, we asked XYZ. Here's what you told us." Use direct quotes from survey participants.
- When possible, provide examples of how participants have impacted the organization. For example, ACLU Insight Panelists asked for regular email explainers of pressing issues, and as a result the team launched a regular "Issue Spotlight" email series.
- Provide a chart or graph showcasing an interesting insight from a closed-end response.

Don't feel like you have to report EVERYTHING you learned. Three takeaways should be sufficient.

4 Rinse and repeat monthly.

You now are in a monthly cycle and should be getting into a groove.

When will you launch your monthly emails?

January:	February:	March:
April:	**May:**	**June:**
July:	**August:**	**September:**
October:	**November:**	**December:**

DIY STEP-BY-STEP

Phase III: Analyze results.

Now that you are launching your monthly probes, you'll want to analyze your results. Here are two key steps you must take.

1 Interpret and respond to the monthly data.

What are you learning and how can you put it into action?

Each month, we review the data in the following ways:

- **What was the response rate?** We have come to see 20% as a good baseline response rate for each monthly probe. That means 20% of Insight Panel members click over to the survey and complete it.
- If response rates fall consistently below 20%, **take a look at email open and click-thru rates to see where the drop-off may be occurring.** In past instances we have found that modifications to the email or survey instrument itself can lift response rates. You may want to consider "surprise and delight" tactics to boost response, such as including a promise of a merch coupon code or a video from the CEO answering panelists' questions upon completion of the survey.
- **Review closed-ended questions.** A closed-ended question is one where the panelist must choose from a limited set of possible responses (e.g. very interested, interested, not that interested). Look at break-outs of closed-ended responses by segment to identify any meaningful differences.
- **Review open-ended questions.** These responses reveal intensity of feeling, language, and imagery, and provide insights into closed-ended answers. In general they are more revealing indicators of donor sentiment than closed-ended questions. You may see general themes arising in open-ends that can inform your work.
- **Assess the overall thrust or narrative of the responses.** What overall are participants telling you via this survey? Are they happy or sad? In sync with your priorities? Tracking other content or other engagement opportunities? Interested in new initiatives?
- **Address specific donor complaints.** If you are using a pass-thru link that lets you track survey responses to individual donors, you can respond to specific concerns, such as undelivered premiums or address changes.
- **Append donor answers to donor database** (if pass-thru links permit). Many of our clients add unique id's to the survey links for each donor, allowing them to identify the donor and potentially append their responses to their donor record. This is useful for tagging potential planned givers, tracking specific contact preferences and flagging other data that could help shape the organization's approach to that specific donor.

1 Interpret and respond to the monthly data.
(continued)

» **Share your key findings with key organizational stakeholders.** We think it's important to gather your stakeholders monthly to report back findings from the latest survey and discuss potential action implications. This is critical in part because the donors expect that people are actually listening to what they have to say, and equally so the organization can take immediate advantage of the survey results. We generally create a deck each month summarizing the findings, including response rates, graphs of responses to closed ended questions and selected open-end verbatim quotes. The deck pulls together key learnings in a format that is easily shared with others in the organization who might benefit.

Draft your own task list to reflect how you will interpret/respond to monthly survey data.

2 Measure annual success.

How are you tracking toward the goals you set for yourself? (see number 2 in the strategy section above.)

Every year we assess the Insight Panel via a number of criteria. These include:

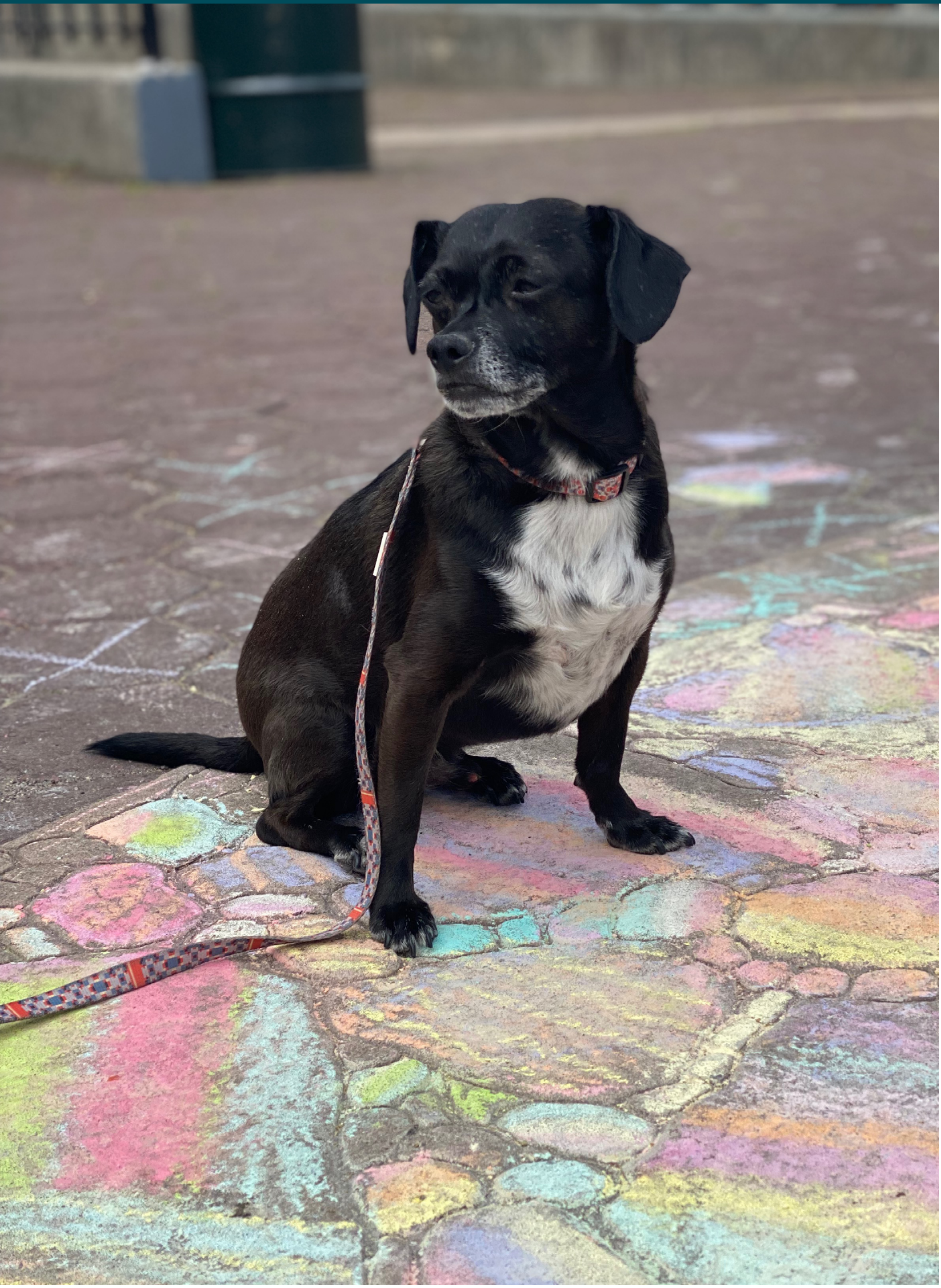
- **Retention as Insight Panelists.** Do panelists choose to continue to participate or do they opt-out? Note: Some clients only offer the Insight Panel as a year-long experience, while others invite participants to continue indefinitely.
- **Panelist satisfaction.** Based on specific survey questions, do your participants enjoy being part of the Insight Panel, do they believe it is worth their while, and does it make them feel more connected to the organization?
- **Satisfaction with the organization.** We often use Net Promoter Score® as a tracking metric to measure any changes in the level and intensity of donor affinity.
- **Donor retention and upgrades.** This is a critical measure of success. How are donors who participate retaining and upgrading their support of your organization?

How and when will you assess the success of your Insight Panel?

Congratulations!

If you have followed each step, you have shifted your fundraising program into a relationship-building program that will ultimately yield stronger bonds with and deeper loyalty from your donors.

Way to turn that monologue into a conversation!



Case Study

Best Friends Animal Society

- **Year Established** | 2021
- **Goals**
  - Increase donor loyalty and support efforts to move donors into higher levels of giving.
  - Provide key insights to fundraising, marketing/ communications and programs teams.
- **Invitees/segments**
  - VIPs (Major donors and planned givers)
  - Monthly donors
  - Mid level donors
  - Mid level prospects
  - Loyal donors 3+ years
  - New donors last 12 months
- **# of Panelists** | 5,000+
- **Typical probe response rate** | 35%

Case Study

Best Friends Animal Society *(continued)*

Ongoing or Time-bound

Time-bound: We ask for a 12-month commitment and we recruit a new cohort of Panelists each year.

Sample research objectives

- Explore perceptions and experiences of fostering, pairing homeless pets with generous temporary families to alleviate pressure on shelters —with a goal of increasing foster participation.
- Explore attitudes towards monthly giving—with a goal of providing feedback to improve success of an upcoming monthly donor campaign.
- Ask for specific topics/campaigns Panelists are most interested in—with a goal of sending them impact reports based on their preferences.

Sample cultivation probes

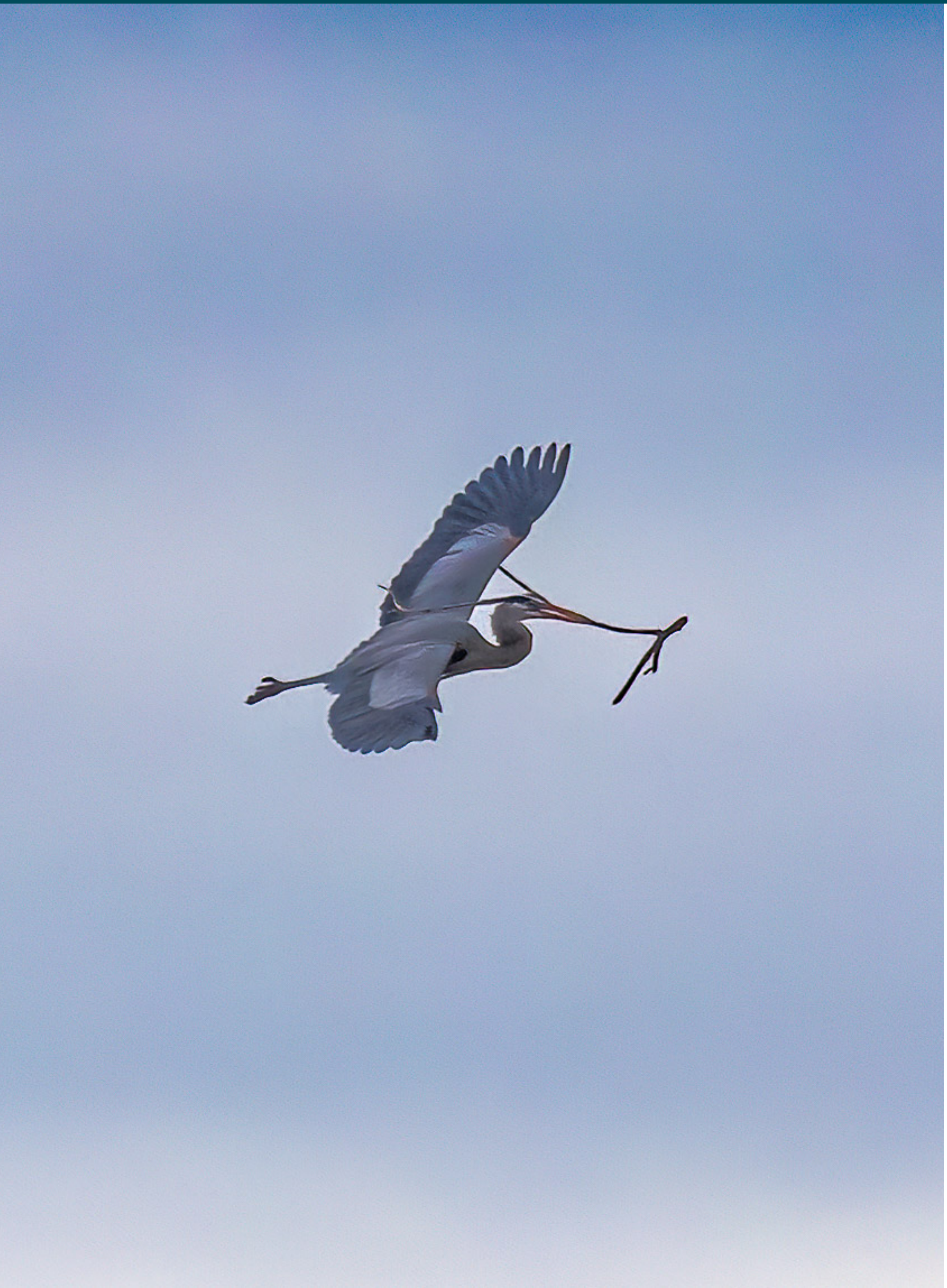
- How do you spend the holidays with your pets?
- What's the silliest nickname you've ever given a pet?
- Share a photo of your pet enjoying the summer season.

Internal stakeholders

- Chief Experience Officer
- Annual Giving Director
- Director of Stewardship
- Director of Digital Engagement
- Direct Response Specialist
- Senior Manager of CRM Systems and Analytics
- Senior Manager, Direct Marketing
- Consultants

Panelist Quotes

- "If Best Friends was a rock band, we would be groupies!"
- "I was very impressed that I received a personal call from Cathy at Best Friends regarding a comment I made on a previous survey. Thank you, Cathy!"
- "I look forward to the monthly Insight Panel and knowing that it's important to your organization makes me proud to give input that'll be appreciated."
- "I've been thinking more seriously about fostering since your last survey. I reached out to a local rescue here and think I'm going to take the plunge. Thanks for the encouragement!"



Case Study

National Audubon Society

Year Established | 2018

Goals

- Provide engagement opportunities and a sense of connection for midlevel donors, sustainers and other members.
- Track changes in donor sentiment on pressing issues like climate change and conservation politics.
- Co-create content for the larger member community consisting of photos, stories, etc.
- Test messaging and organizational priorities.

Invitees/segments

- Midlevel donors (Great Egret Society)
- Monthly sustainers
- Member/donors HPC under $500
- Planned givers

# of Panelists | 5,000

Typical probe response rate | 20-25%

Case Study

National Audubon Society *(continued)*

Ongoing or Time-bound

Ongoing: we provide opt-out opportunities annually though only 1% of donors opt out each year.

Sample research objectives

- Assess extent to which donors were taking solace in backyard birds during the pandemic.
- Assess donor support for Audubon climate initiatives.
- Assess donor support for racial justice initiatives in the context of Audubon's conservation work.

Sample cultivation probes

- Tell the story of your earliest memory of being interested in birds.
- Express your love of birds in the form of a six-word story.
- What were your favorite experiences during Fall migration?

Internal stakeholders

- Vice President, Membership
- Senior Director, Direct Response
- Senior Manager, Mid-Level Giving
- Director, Digital Fundraising
- Consultants

Panelist Quotes

- "I love being part of a community of people who love birds and are concerned about protecting our planet for us and all the other life that calls this place home. Love staying in the know about what's going on in regards to these issues and helping where I can."
- "You do a great job of mixing together the anecdotes and factoids that appeal to a bird lover, the legislation and impact reports that appeal to a conservationist, and the how-to that appeal to a backyard enthusiast. I also appreciate that it's not all doomsday, even though I know that things are bad. Thank you for feeding so many parts of what I need in my relationship to birds."
- "I enjoyed your sharing some of the panelists' comments with the email that came with this survey. It reinforces the connection to the Audubon community."
- "WOW...cannot believe [my] picture made the inclusion...that was a truly wonderful day! The Snowy Owl female was wonderful to see, but the swans...a true 'luck shot' of magnificent birds! Thank you!"

Appendix A

DARCI Accountability Grid

This tool is available online at atctools.org

What it is

A tool for establishing clear accountability in teams and organizations

What it can do

This tool can assist you to:

- Quickly clarify accountability for virtually any organizational activity
- Clarify specific roles for everyone involved in a project
- Create a shared language for assigning and tracking accountability
- Enhance organizational efficiency
- Deepen trust by improving follow-through

How it works

With regard to a specific project, assign clear accountability as follows[1]

- **DECIDER/DELEGATOR:** Holds the ultimate power re. the project. Power can be retained as the right of final approval/veto, or delegated to the **A**. The **D** might be an individual leader, or it could be a group such as the management team or Board.
- **ACCOUNTABLE:** The single person fully accountable for making the project happen. The **A** must be given sufficient decision-making power and room to learn/adjust commensurate with accountability. It is possible for a **D** to also be the **A**. There should never be more than one **A**. This is an invitation to lack of clear accountability. If no one is willing to be the **A**, do not proceed.
- **RESPONSIBLE:** Those responsible for doing the work on the project. There may be a number of **R**'s on a project. **R**'s are responsible for dealing with roadblocks, raising questions, etc. – not just being "good soldiers."
- **CONSULTED:** Those from whom input will be solicited.
- **INFORMED:** Those to be kept apprised of relevant developments. This is an FYI role. *NOTE: **I**'s may not use the information to undermine the process.*

  *Unless someone is officially an **I**, consider not cc'ing them on emails. This is a good way to cut down on unnecessary emails.*

[1] Create a DARCI Grid appropriate for your situation using the example on the following page.

Appendix A

DARCI Accountability Grid *(continued)*

This tool is available online at atctools.org

	D	A	R	C	I
	Decider/**D**elegator	**A**ccountable	**R**esponsible	**C**onsulted	**I**nformed
Projects	Holds the ultimate power re. the project. Power can be retained as the right of final approval/veto, or delegated to the A.	The single person fully accountable for making the project happen.	Those responsible for doing the work on the project.	Those from whom input will be solicited.	Those to be kept apprised of relevant developments.

Appendix B

Net Promoter Score (NPS®)

Boiled down to its essentials, a Net Promoter System has just three requirements:

- Net Promoter organizations regularly sort their donors and prospects into three simple groups: promoters, passives and detractors by using this question: On a 0-to-10 scale, how likely is it that you would recommend us (or this product or service) to a friend or colleague? What is the primary reason for your score?
- Donor responses to the first question allow you to classify them as promoters (9–10), passives (7–8) or detractors (0–6). The responses also enable you to create a Net Promoter Score (NPS®), which is simply the percentage of promoters minus the percentage of detractors.
- You can analyze this score by segment, and you can track it from quarter to quarter to see how your loyalty-building efforts are working.

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