



Answers and Action: Donor Survey Insights (and What Came Next)



Today's speakers



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Today's agenda

1. Introducing The MetroHealth Foundation
2. 2023 Donor Survey
 - Phase I: Donor Analysis
 - Phase II: Survey
 - Phase III: Survey Findings
3. What Happened Next?
 - Opportunities for Annual Giving, Pipeline Development + Moves Management
4. Questions + Discussion



Introducing The MetroHeath Foundation



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The MetroHealth System

- One of three major health systems in Cleveland, employing more than 8,000 individuals
- Cuyahoga County's public hospital serving Greater Cleveland since 1837
- We go beyond traditional medicine—creating a national model, focused as much on promoting health as on treating illness
- We provide extraordinary care medical care at 4 hospitals, 4 emergency departments, more than 20 health centers and 40 additional sites
- 97% of Cuyahoga County residents are within a 10-minute drive of a MetroHealth facility



The MetroHealth System

- The region's most experienced Level 1 Adult Trauma Center
- One of only two verified adult and pediatric burn centers in Ohio
- Rehabilitation Institute is ranked as one of the best in the nation for treating the most complex cases
- Teaching hospital with a long-standing affiliation with Case Western Reserve School of Medicine
- Created the Institute for H.O.P.E™ to address the social drivers of health that adversely impact health and well-being
- Home to the nation's first high school located inside a hospital; the school is creating pathways to health careers for Cleveland students





MetroHealth Philanthropy

The MetroHealth Foundation:

- Founded in 1954
- A 501(c)(3) charitable organization with the sole purpose of supporting The MetroHealth System by raising philanthropic resources for patient care, scientific/clinical research and medical education

Health Equity is woven into all we do:

- Transformation/capital projects
- MetroHealth Rehabilitation Institute
- MetroHealth Behavioral Health
- Institute for H.O.P.E.™
(Health, Opportunities, Partnership, Empowerment)

For All of Us Campaign

- Comprehensive fundraising campaign with initial goal of \$100 million
 - \$40 million for capital
 - \$60 million for endowment and programs
- Public phase launched in 2019
- Transformational gift of \$42 million received in 2020 and goal increased to \$150 million
- More than \$133 million raised to date
- Campaign ends in 2024





Why did we do a Donor Survey?



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2023 DONOR SURVEY

Phase I: Donor Analysis





Methodology

We reviewed the following data for The MetroHealth Foundation:

- **Donor Database: 4,665 records***
 - Giving History (back to 1984!)
 - Giving Preferences
 - Constituent Demographics
 - iWave Scores
- **Gift Reports for 2020, 2021 and 2022**
- **Email Engagement Report for 2018-2021**
- **Miscellaneous**
 - Top 25 High Wealth Zip Codes List
 - Direct Mail Appeals, 2017-2022
 - Annual Fund Appeals, 2016-2022

**excluding org records and deceased individuals*

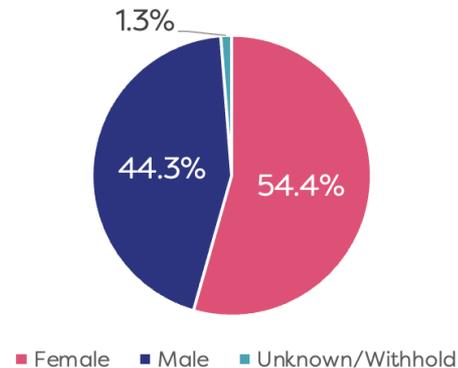
Phase I: Overview

High-level donor demographics:

- Mostly non-employees (73.6%)
- Majority female (54.4%)
- Largest age group is 65+ (39.5%)
- Most live in Ohio (91.0%) with 9.9% living in your target zip codes
- Email addresses for 47.2% of donors
- 9.2% are in a portfolio

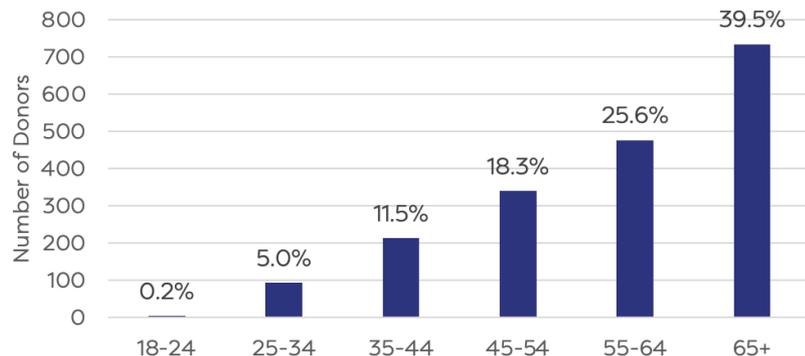
Donors by Gender

(n=3,894)



Donor Age Ranges

(n=1,867)





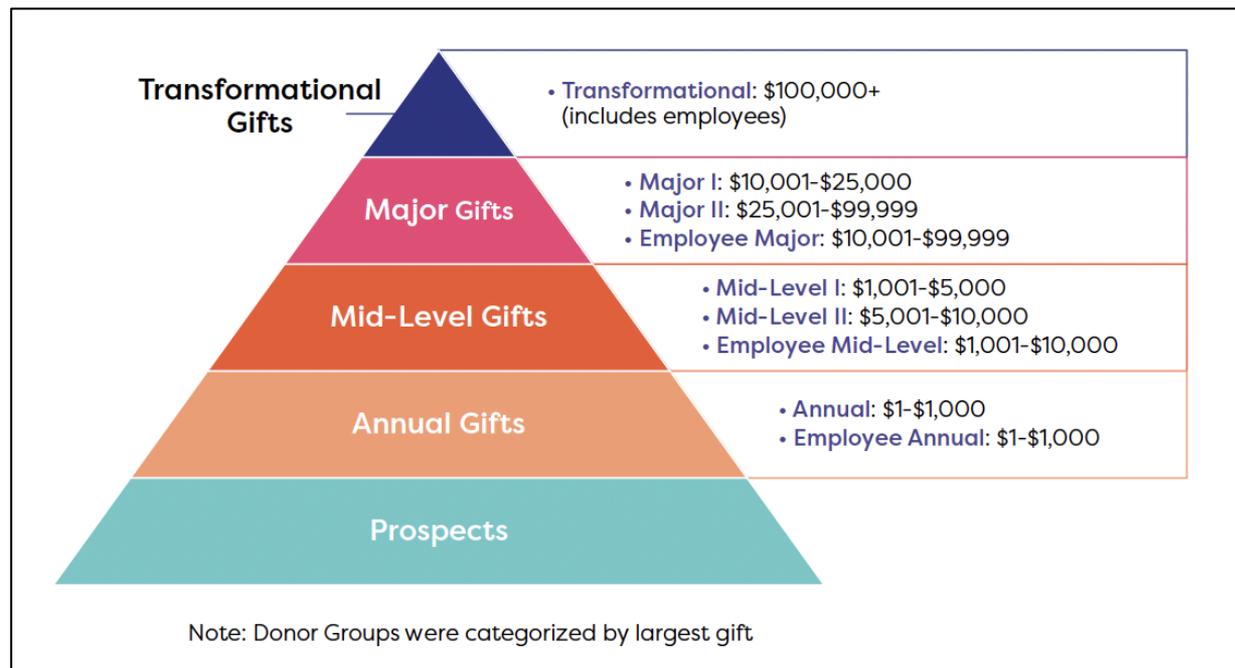
Phase I: Gift Report Analysis

We completed a Gift Report Analysis from 1/1/2020 through 12/31/2022 and identified:

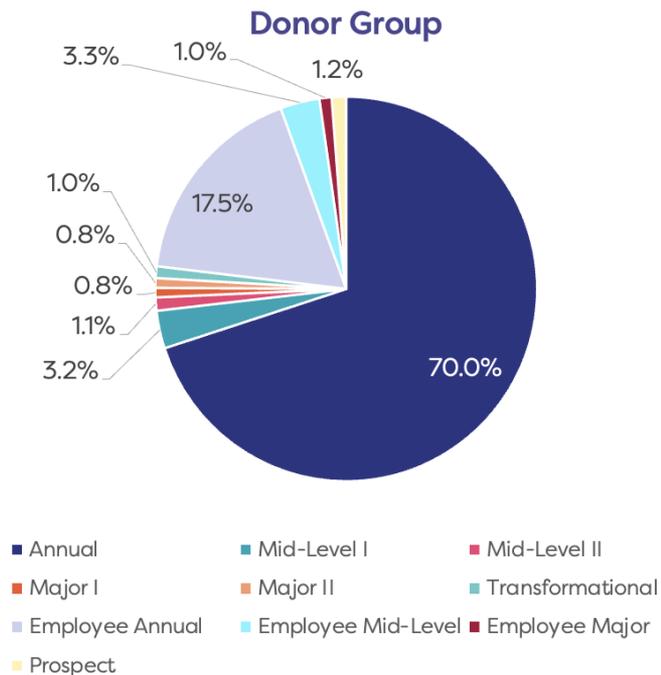
- Good potential for an annual giving program
- Good mid-level stability/growth with \$1,000 - \$10,000 (approximately 175 donors)
- Strong major gifts program due to Campaign
- We noted strong potential for more digital cultivation (larger average digital gift size than print by 30.8% on average for the past 3 years)

Phase I: Donor Groups

We completed a Database Deep Dive into donor groups and evaluated demographics, lifetime giving insights, retention and more



Phase I: Donor Groups



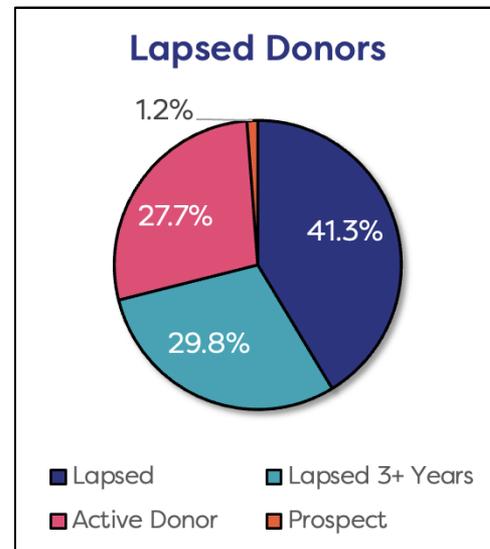
Based on Largest Gift

Donor Group	Count
Annual (\$1-\$1,000)	3,266
Mid-Level I (\$1,001-\$5,000)	148
Mid-Level II (\$5,001-\$10,000)	52
Major I (\$10,001-\$25,000)	37
Major II (\$25,001-\$99,999)	38
Transformational (\$100,000+)	46
Employee Annual (\$1-\$1,000)	818
Employee Mid-Level (\$1,000-\$10,000)	155
Employee Major (\$10,001-\$99,999)	48
Prospect (\$0)	57

Phase I: Deep Dive

We performed a deep dive into several donor groups:

- **Lapsed Donors:** Identified major opportunities for improved retention—especially with Annual and some Mid-Level and Major Donors
- **One-Time Donors:** 36.4% of donors have only given 1 time, and 85% of those are annual donors
- **New Donors:** Coming primarily from Annual Giving and Employee Giving—and 92.5% of those have iWave scores of 3-4

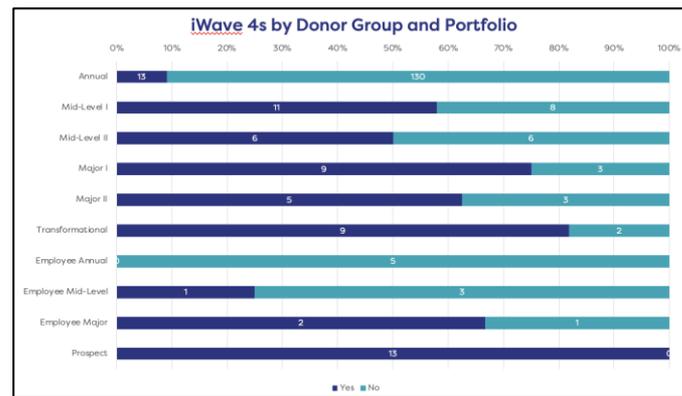
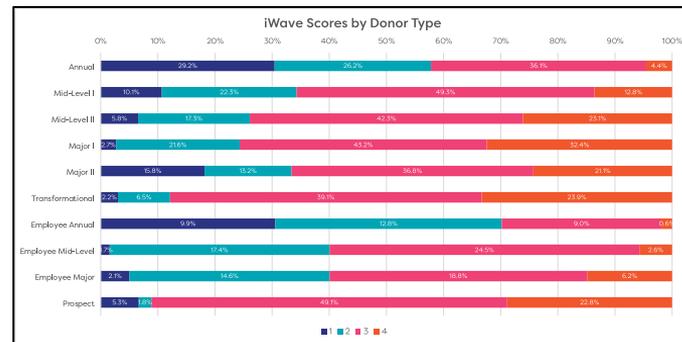


Donor Type	Count
Lapsed	1928
Lapsed 3+ Years	1388
Active Donors	1292
Prospect	57

Phase I: Deep Dive

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- **Lapsed Donors:** Identified major opportunities for improved retention—especially with Annual and some Mid-Level and Major Donors
- **One-Time Donors:** 36.4% of donors have only given 1 time, and 85% of those are annual donors
- **New Donors:** Coming primarily from Annual Giving and Employee Giving—and 92.5% of those have iWave scores of 3-4
- **iWave Scores:** Found good opportunities of untapped potential as only 30.0% of iWave 4s are in portfolios, and numerous “Ideal Planned Givers” are not in portfolios





Phase I: Recommended Personas

We recommended using unique surveys to examine these personas, and cross-analysis to study key secondary characteristics:

Primary Personas

- Active Donors
- Lapsed Donors
- Lapsed 3+ Years Donors
- Prospects
- Employees

Secondary Characteristics

- Mid-Level Donors
- Major Donors
- One-Time Donors
- Donors in Target Zip Codes
- iWave 4s
- People in a Portfolio



2023 DONOR SURVEY Phase II: Survey



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Phase II: Survey Goal + Methodology

Goal

- Gather insights about individuals' charitable relationships with MetroHealth, communication preferences and motivations for giving
- Use results to enhance donor engagement, tailor philanthropic communications and identify opportunities for moves management

Methodology

- Beth Interactive and MetroHealth partnered to create and distribute 5 unique donor surveys to key donors via direct mail and email
- Each was tailored to constituents within each of the donor personas identified in Phase I, including:
 - Active Donors
 - Lapsed Donors
 - Lapsed 3+ Donors
 - Prospects
 - Employees Donors

Phase II: Survey Process

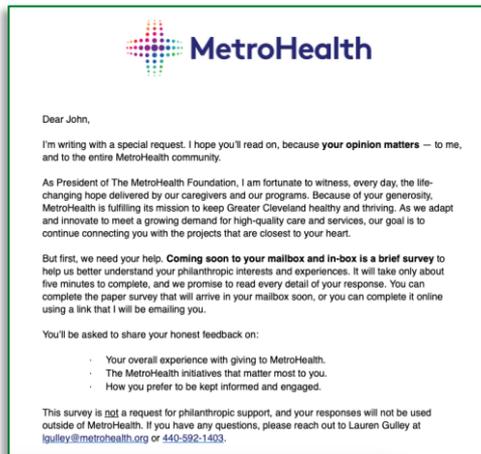
- Distribution method included 1 direct mail piece and 4 emails in May and June 2023
- Surveys included multiple-choice and open-ended questions for qualitative insights tailored to each persona (23-29 total questions)
- Surveys used unique identifiers to match replies to donor personas—and QR codes to encourage online submission
- All print survey responses received were manually entered into SurveyMonkey



Phase II: Survey Audiences

- Mailed surveys distributed to all 4,638 constituents with home addresses on file
- Email surveys distributed to 2,204 constituents with emails on file:
 - 1 scout email
 - 3 reminder emails

Scout Email



The Scout Email template features the MetroHealth logo at the top. The body of the email is addressed to "Dear John" and contains the following text:

Dear John,

I'm writing with a special request. I hope you'll read on, because **your opinion matters** — to me, and to the entire MetroHealth community.

As President of The MetroHealth Foundation, I am fortunate to witness, every day, the life-changing hope delivered by our caregivers and our programs. Because of your generosity, MetroHealth is fulfilling its mission to keep Greater Cleveland healthy and thriving. As we adapt and innovate to meet a growing demand for high-quality care and services, our goal is to continue connecting you with the projects that are closest to your heart.

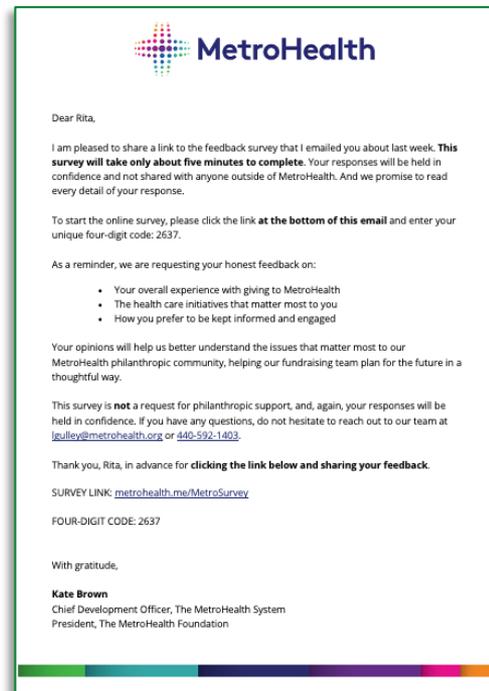
But first, we need your help. **Coming soon to your mailbox and in-box is a brief survey** to help us better understand your philanthropic interests and experiences. It will take only about five minutes to complete, and we promise to read every detail of your response. You can complete the paper survey that will arrive in your mailbox soon, or you can complete it online using a link that I will be emailing you.

You'll be asked to share your honest feedback on:

- Your overall experience with giving to MetroHealth.
- The MetroHealth initiatives that matter most to you.
- How you prefer to be kept informed and engaged.

This survey is **not** a request for philanthropic support, and your responses will not be used outside of MetroHealth. If you have any questions, please reach out to Lauren Gullely at lgullely@metrohealth.org or 440-592-1403.

Reminder Email #1



The Reminder Email #1 template features the MetroHealth logo at the top. The body of the email is addressed to "Dear Rita" and contains the following text:

Dear Rita,

I am pleased to share a link to the feedback survey that I emailed you about last week. **This survey will take only about five minutes to complete.** Your responses will be held in confidence and not shared with anyone outside of MetroHealth. And we promise to read every detail of your response.

To start the online survey, please click the link **at the bottom of this email** and enter your unique four-digit code: 2637.

As a reminder, we are requesting your honest feedback on:

- Your overall experience with giving to MetroHealth
- The health care initiatives that matter most to you
- How you prefer to be kept informed and engaged

Your opinions will help us better understand the issues that matter most to our MetroHealth philanthropic community, helping our fundraising team plan for the future in a thoughtful way.

This survey is **not** a request for philanthropic support, and, again, your responses will be held in confidence. If you have any questions, do not hesitate to reach out to our team at lgullely@metrohealth.org or 440-592-1403.

Thank you, Rita, in advance for **clicking the link below and sharing your feedback**.

SURVEY LINK: metrohealth.me/MetroSurvey

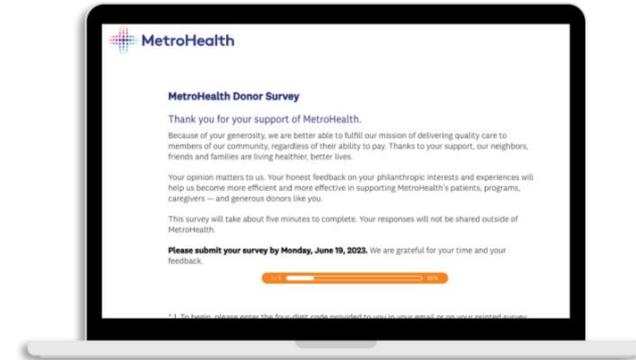
FOUR-DIGIT CODE: 2637

With gratitude,

Kate Brown
Chief Development Officer, The MetroHealth System
President, The MetroHealth Foundation

Phase II: Total Survey Responses

- Total Responses: **633**
 - Online Responses: 439
 - Print Responses: 194
- Response Rate: **13.6%**
- Average Completion Rate: **90.4%***
 - Above SurveyMonkey's 85% average for 30-question surveys
- Average Time Spent: **6 minutes, 12 seconds***
 - Below SurveyMonkey's 9-10 minute completion time estimate for 26-30 question surveys



**Average estimates may be skewed by data manually entered from print surveys*

Phase II: Survey Responses

Active Donors: 179

- Online Responses: 74
- Print Responses: 105
- Response Rate: 19.6%
- Completion Rate: 93%
- 59% are Annual Donors

Lapsed Donors: 95

- Online Responses: 30
- Print Responses: 65
- Response Rate: 5.7%
- Completion Rate: 92%
- 77% are Annual Donors

Lapsed 3+ Donors: 38

- Online Responses: 27
- Print Responses: 11
- Response Rate: 3.1%
- Completion Rate: 84%
- 68% are Annual Donors

Prospects: 3

- Online Responses: 3
- Print Responses: 0
- Response Rate: 3.9%
- Completion Rate: 100%

Employee Donors: 318

- Online Responses: 305
- Print Responses: 13
- Response Rate: 41.3%
- Completion Rate: 83%
- 74% are Employee Annual Donors



2023 DONOR SURVEY

Phase III: Survey Findings





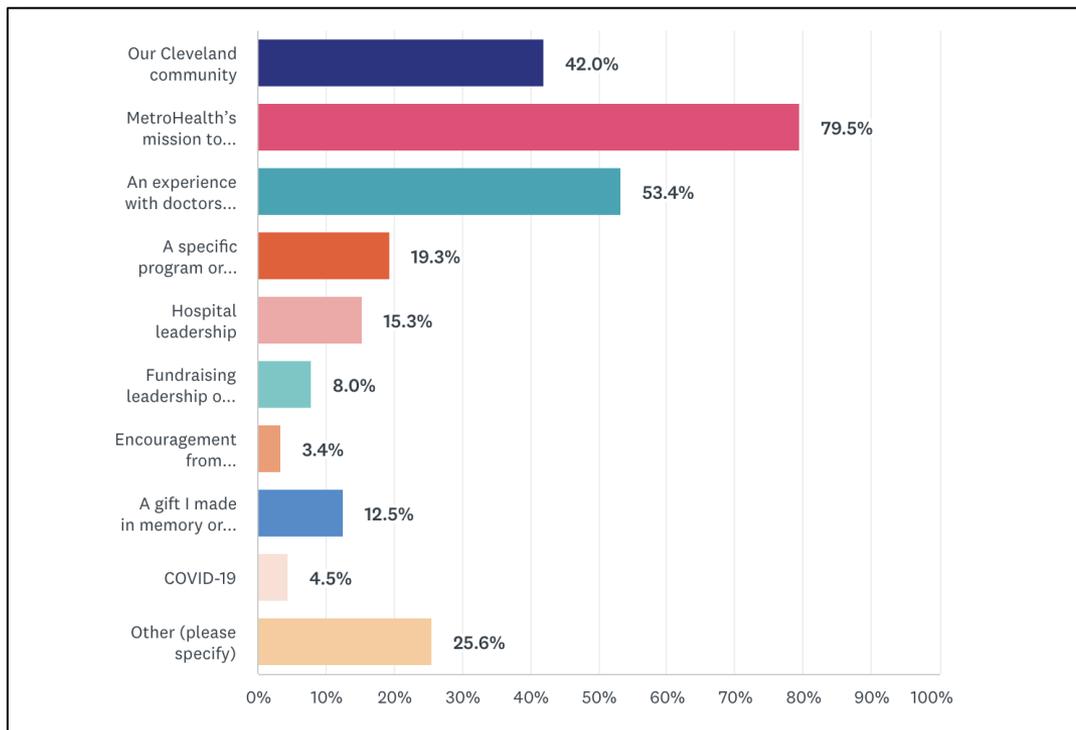
Survey Results by Persona: Your Motivation to Give



I support (have supported) MetroHealth because of: (Select all that apply.)

Active Donors

(176 answered, 3 skipped)

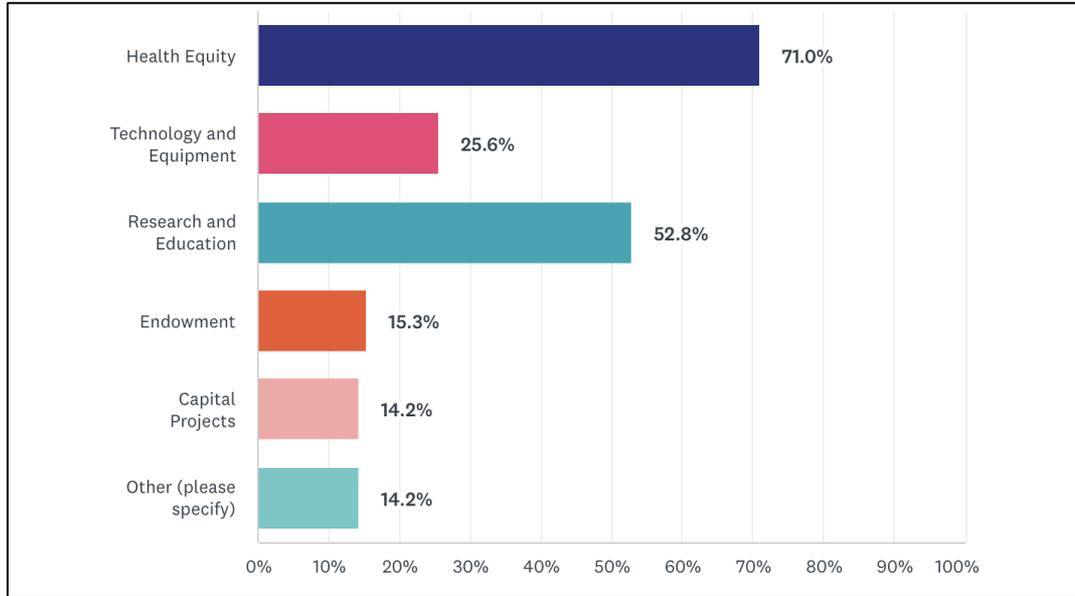


Answer Options

- Our Cleveland community #3
- MetroHealth's mission to serve all #1
- An experience with doctors, nurses or caregivers #2
- A specific program or project (please list below)
- Hospital leadership
- Fundraising leadership or team member
- Encouragement from friends/family
- A gift I made in memory or in honor of a loved one
- COVID-19
- Other (please specify)

Which of MetroHealth's fundraising priorities resonates with you most? (Select all that apply.)

Active Donors
(176 answered, 3 skipped)



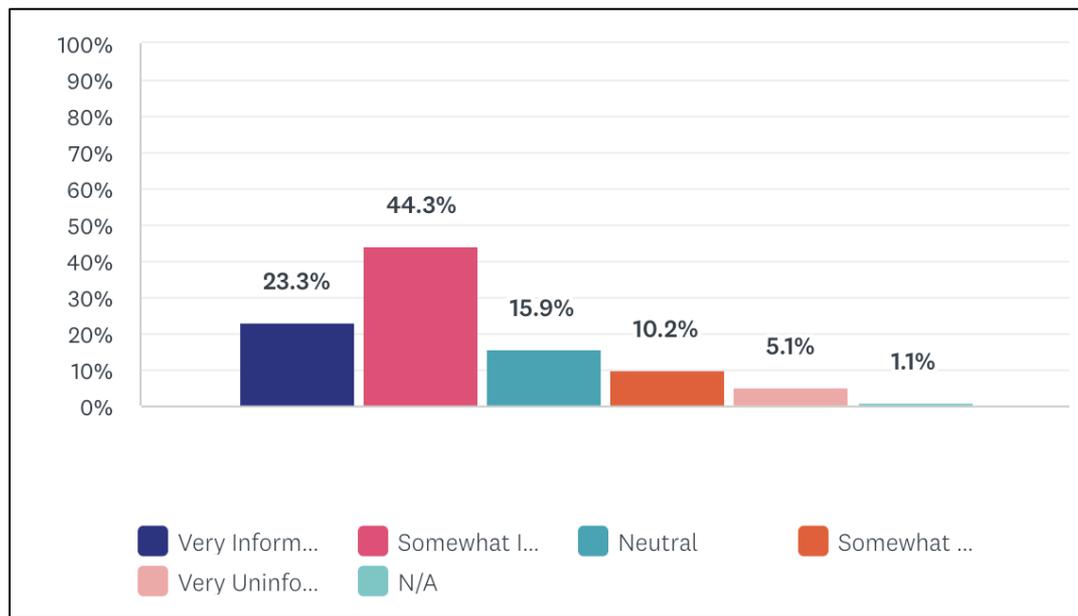
Answer Options

- Health Equity #1
- Technology and Equipment #3
- Research and Education #2
- Endowment
- Capital Projects
- Other (please specify)

How informed do you feel about what's happening at MetroHealth?

Active Donors

(176 answered, 3 skipped)



Answer Options

- Very Informed #1
- Somewhat Informed
- Neutral
- Somewhat Uninformed
- Very Uninformed
- N/A

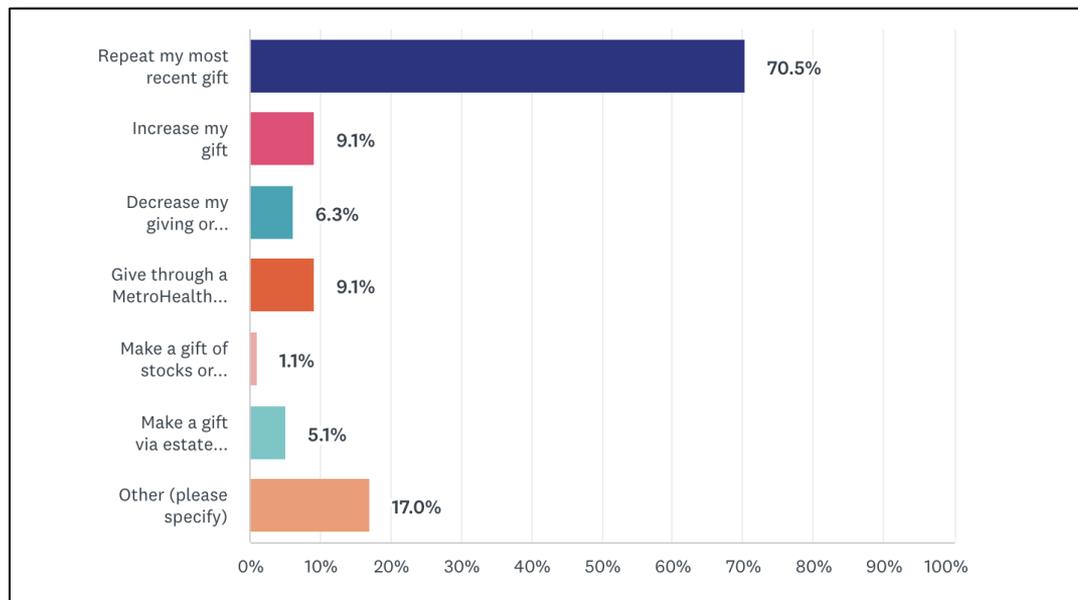
Insights

- Employee Donors feel more informed
- Lapsed and Lapsed 3+ Donors feel more neutral

In the next year, I am most likely to: (Select all that apply.)

Active Donors

(176 answered, 3 skipped)



Answer Options

- Repeat my most recent gift #1
- Increase my gift
- Decrease my giving or transition to other causes
- Give through a MetroHealth event
- Make a gift of stocks or securities
- Make a gift via estate plans/insurance/retirement assets
- Other (please specify)

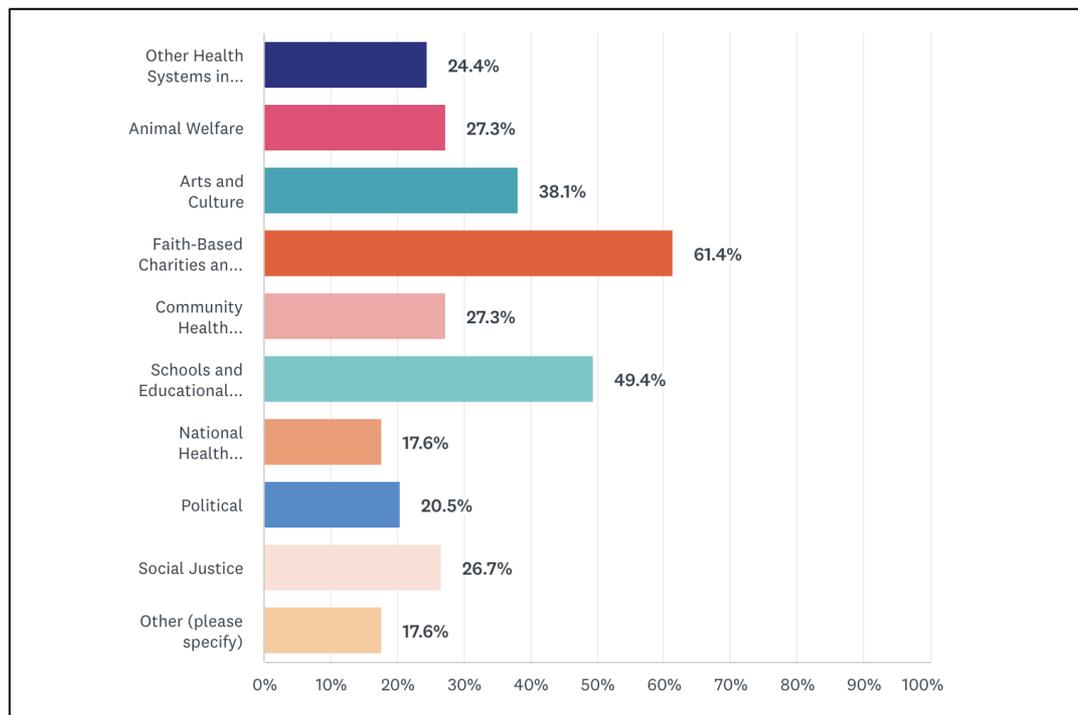
Insights

- Even Lapsed and Lapsed 3+ Donors said they'd repeat their gift!
- 13 people selected estate plans
- "Other" responses are nearly all related to financial uncertainty

What other types of charities or causes do you support? (Select all that apply.)

Active Donors

(176 answered, 3 skipped)

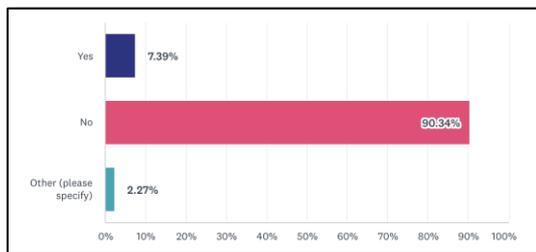


Answer Options

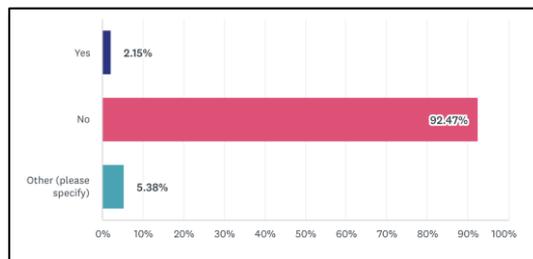
- Other Health Systems in Cleveland*
- Animal Welfare ***
- Arts and Culture ***
- Faith-Based Charities and Organizations #1*
- Community Health Non-Profits ***
- Schools and Educational Institutions #2*
- National Health Non-Profits*
- Political*
- Social Justice ***
- Other (please specify)*

Have you included MetroHealth in your estate plan?

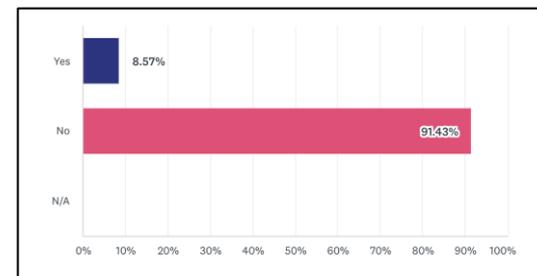
Active Donors
(176 answered, 3 skipped)



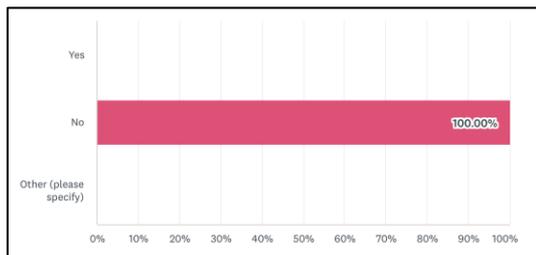
Lapsed Donors
(93 answered, 2 skipped)



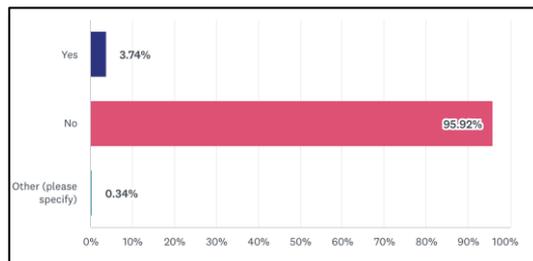
Lapsed 3+ Donors
(35 answered, 3 skipped)



Prospects
(3 answered, 0 skipped)



Employee Donors
(294 answered, 24 skipped)



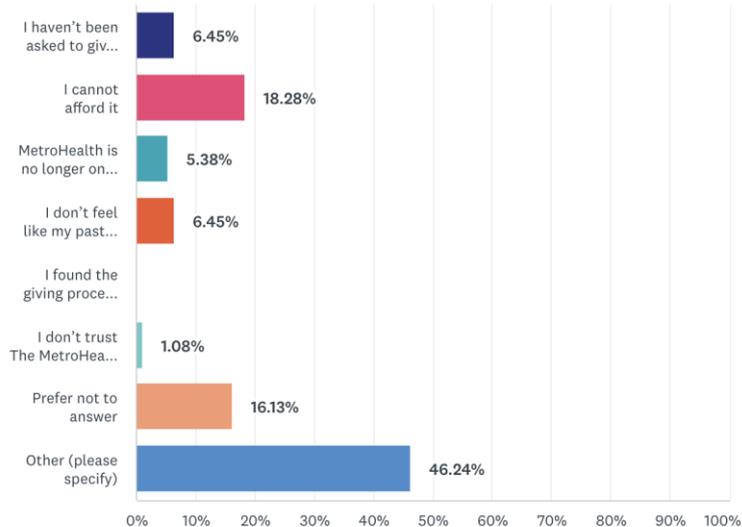
- Nearly 9% of Lapsed 3+ Donors and 7% of Active Donors **have included MetroHealth in their estate plan**
- 29 total donors have MetroHealth in their estate plans—or will soon!
- An additional 13 donors said they are likely to make a gift via estate plans/insurance/retirement assets

Lapsed Donors: What has prevented you from making a donation to MetroHealth in recent years?

Lapsed Donors
(93 answered, 2 skipped)

What has prevented you from making a donation to MetroHealth in recent years? (Please select all that apply.)

Answered: 93 Skipped: 2



Answer Options

- I haven't been asked to give again*
- I cannot afford it*
- MetroHealth is no longer one of my preferred charities*
- I don't feel like my past contributions mattered*
- I found the giving process too complicated*
- I don't trust the MetroHealth system*
- Prefer not to answer*
- Other (please specify) #1*

Insights

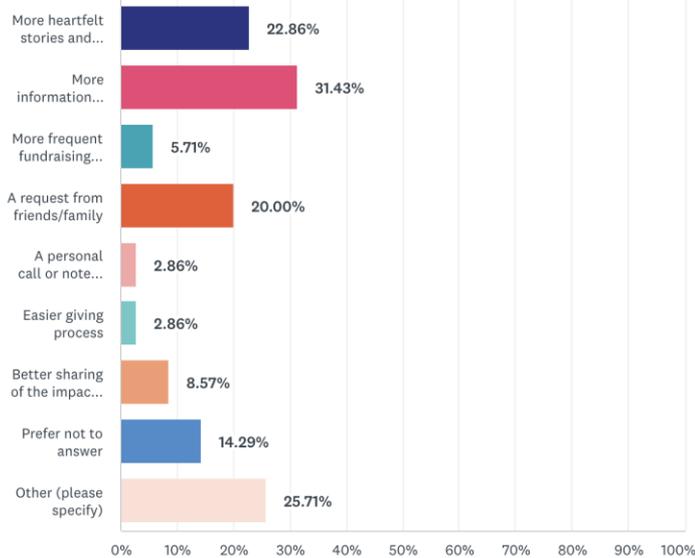
- "I cannot afford it"** and financial reasons have overwhelmingly prevented Lapsed Donors from making a recent gift

Lapsed 3+ Donors: What would encourage you to support MetroHealth again in the future?

Lapsed 3+ Donors
(35 answered, 3 skipped)

What would encourage you to support MetroHealth again in the future?
(Please select all that apply.)

Answered: 35 Skipped: 3



Answer Options

- More heartfelt stories and testimonials about the impact of giving #2
- More information about urgent needs #1
- More frequent fundraising appeals
- A request from friends/family #3
- A personal call /note from fundraising staff
- Easier giving process
- Better sharing of the impact of past giving
- Prefer not to answer
- Other (please specify)

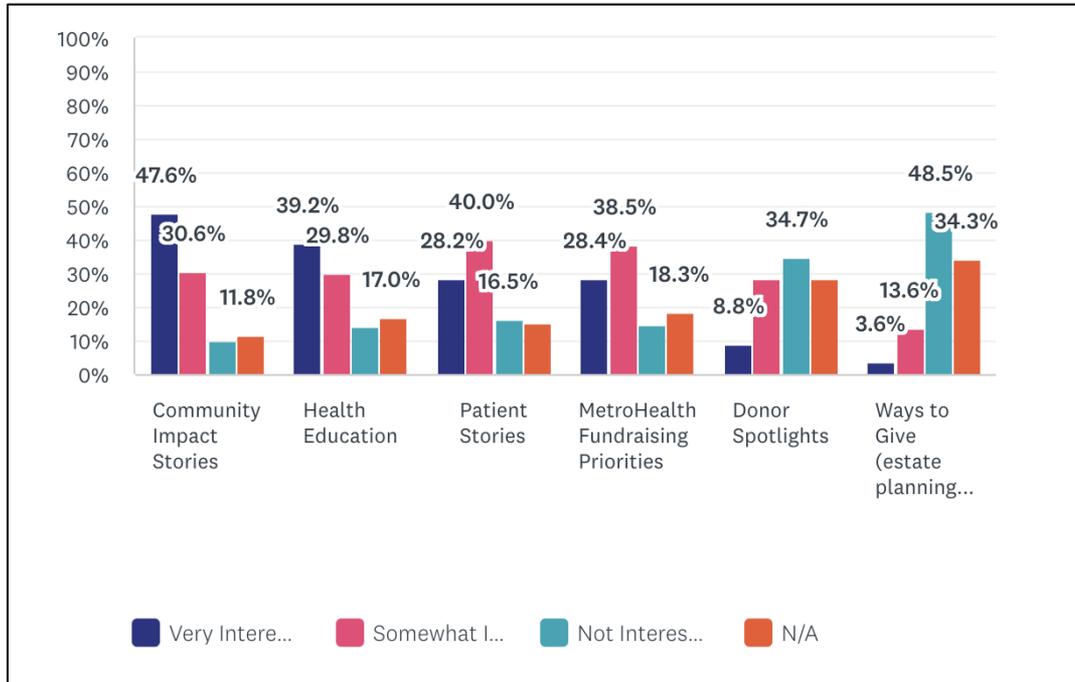


Survey Results by Persona: Your Communications Preferences



Please rate your level of interest in receiving the following types of philanthropic information from MetroHealth.

Active Donors
(171 answered, 8 skipped)



Answer Options

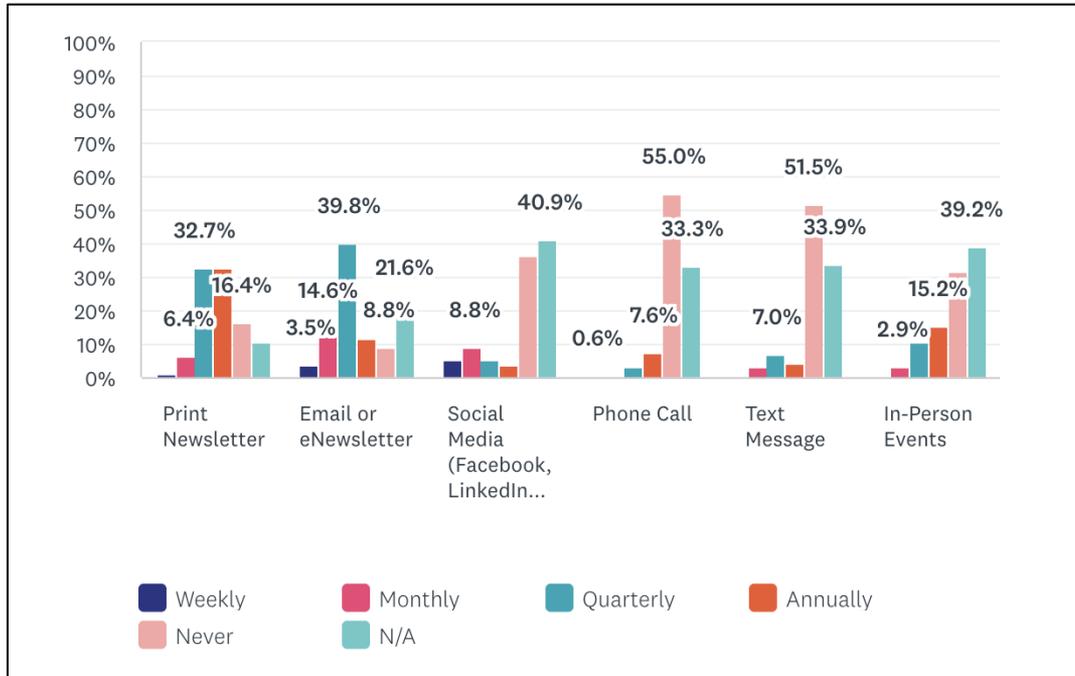
- Community Impact Stories #1
- Health Education #2
- Patient Stories
- MetroHealth Fundraising Priorities
- Donor Spotlights
- Ways to Give (estate planning, stock, retirement assets, etc.)

Insights

- Lapsed 3+ Donors, Prospects and Employees are more interested in MetroHealth Fundraising Priorities than others
- Prospects and Employees are more interested in Patient Stories than others

How frequently would you prefer to receive MetroHealth's philanthropic communications through the following channels?

Active Donors
(171 answered, 8 skipped)



Answer Options

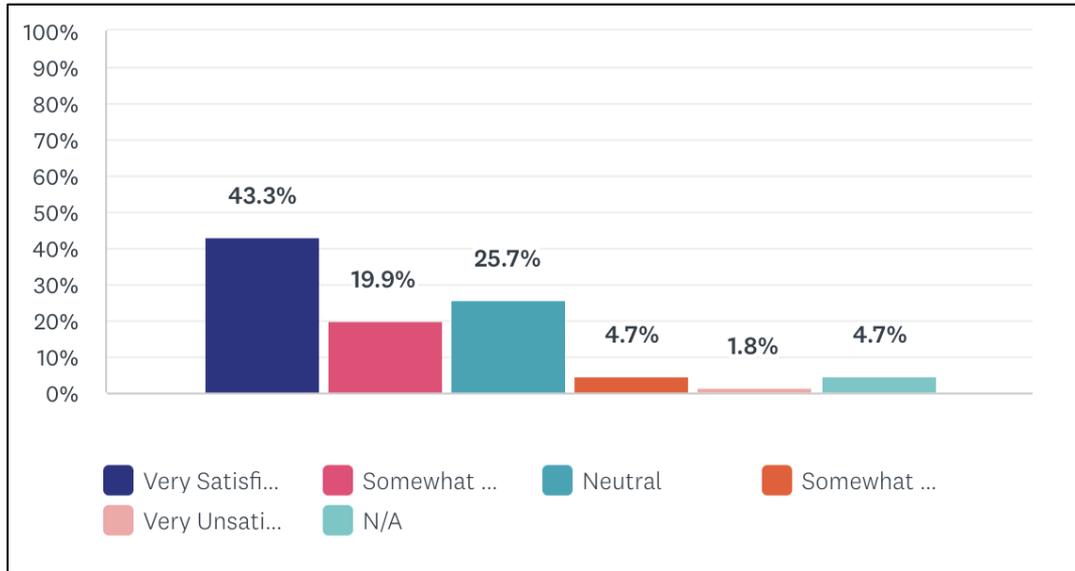
- Print Newsletter Quarterly*
- Email or eNewsletter Quarterly*
- Social Media (Facebook, LinkedIn, etc.)*
- Phone Call*
- Text Message*
- In-Person Events*

Insights

- Social media, phone, text and events don't appeal to most
- Employees are slightly more interested in monthly communications
- Note: Age and "attitude vs. behavior" may be skewing the results

How satisfied are you with the way we've communicated the impact your gift is making at MetroHealth?

Active Donors
(171 answered, 8 skipped)

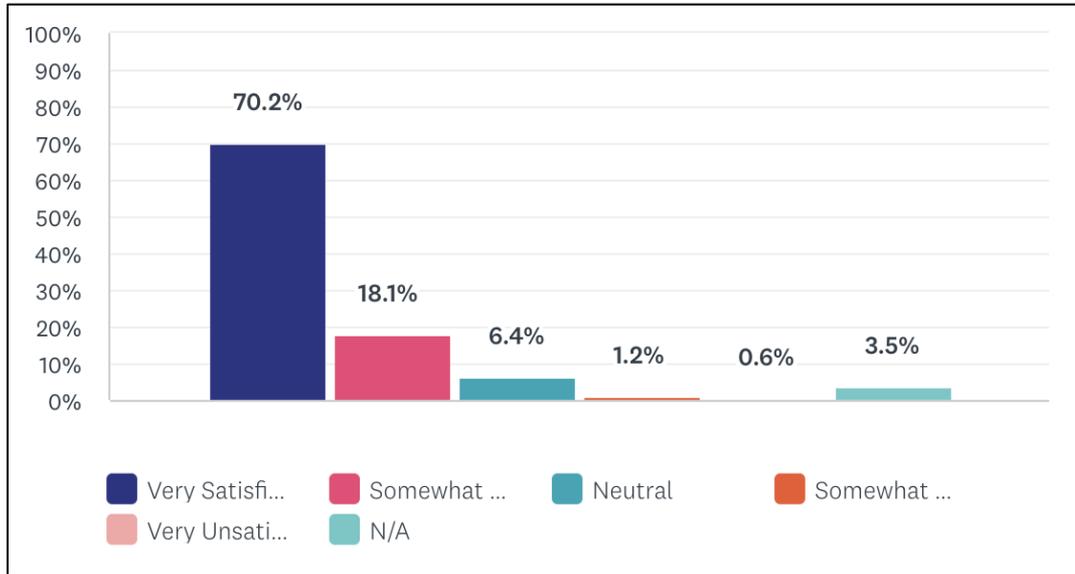


Answer Options

- Very Satisfied #1
- Somewhat Satisfied
- Neutral
- Somewhat Unsatisfied
- Very Unsatisfied
- N/A

How satisfied are you with the thank you communications you've received from MetroHealth following your gift(s)?

Active Donors
(171 answered, 8 skipped)

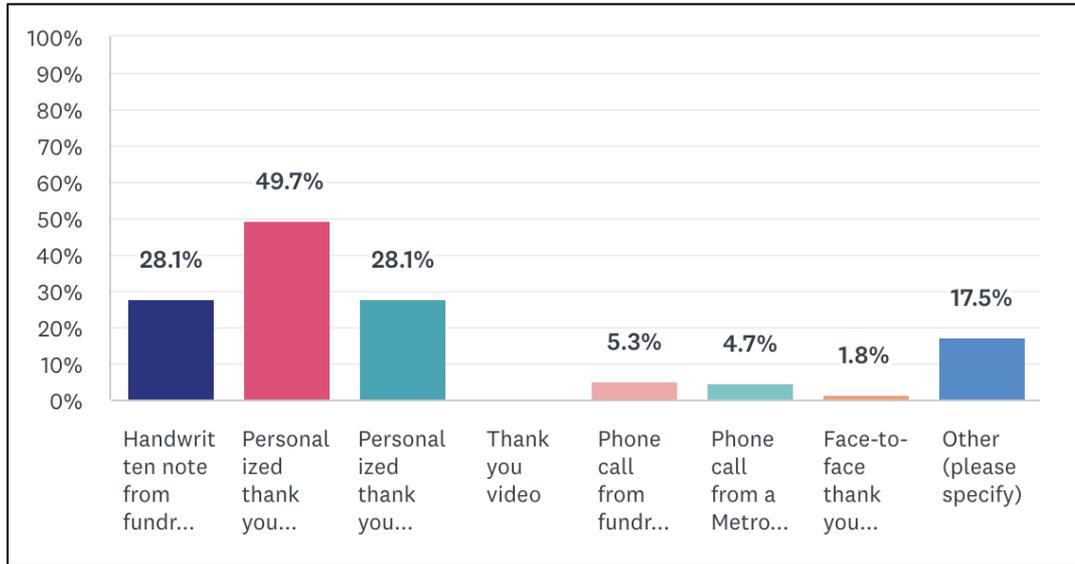


Answer Options

- Very Satisfied #1
- Somewhat Satisfied
- Neutral
- Somewhat Unsatisfied
- Very Unsatisfied
- N/A

What is the most meaningful way for MetroHealth to express gratitude for your gift? (Select all that apply.)

Active Donors
(171 answered, 8 skipped)

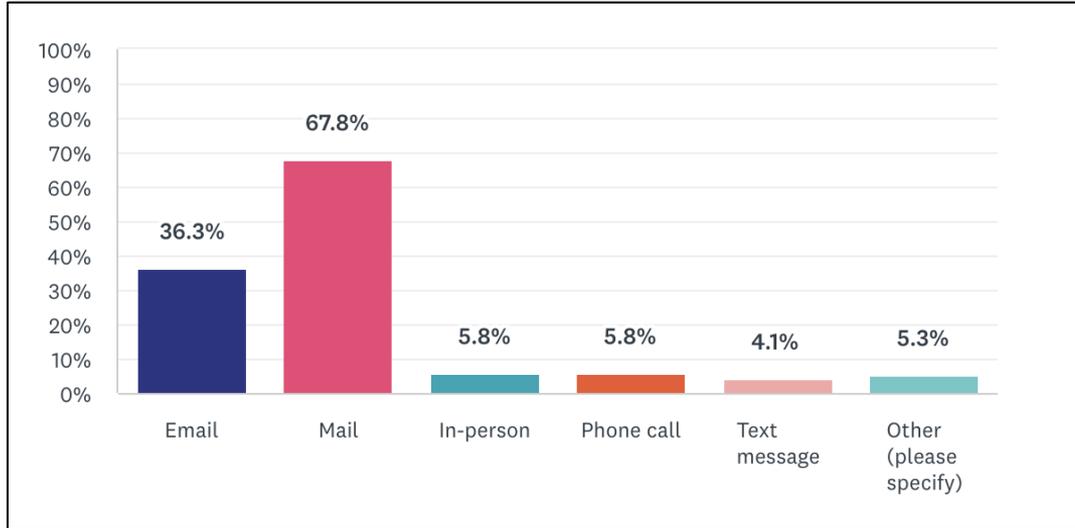


Answer Options

- Handwritten note from fundraising staff #3
- Personalized thank you letter via mail #1
- Personalized thank you email #2
- Thank you video
- Phone call from fundraising staff
- Phone call from MetroHealth Foundation Board member
- Face-to-face thank you in-person or via virtual platform (Zoom)
- Other (please specify)

When we ask for your financial support, how would you prefer to be contacted? (Select all that apply.)

Active Donors
(171 answered, 8 skipped)



Answer Options

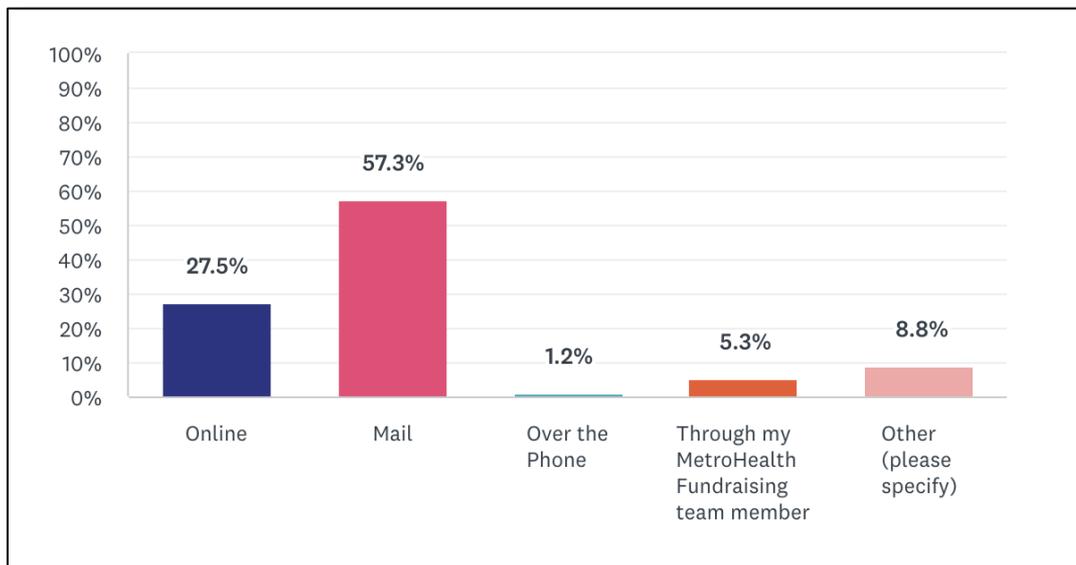
- Email #2
- Mail #1
- In-person
- Phone call
- Text message
- Other (please specify)

Insights

- Employee Donors prefer Email
- Sneak peek: Mid-level, Major, Portfolio and One-Time donors also prefer Email!

What is your preferred way to make a gift?

Active Donors
(171 answered, 8 skipped)



Answer Options

- Online #2
- Mail #1
- Over the phone
- Through my MetroHealth Fundraising team member
- Other (please specify)

Insights

- Employee Donors prefer Payroll Deduction
- "Other" responses included DAFs, QCDs and IRAs

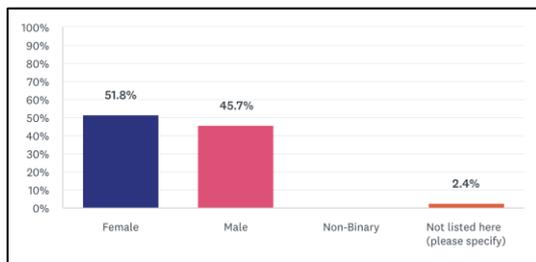


Survey Results by Persona: Your Demographics

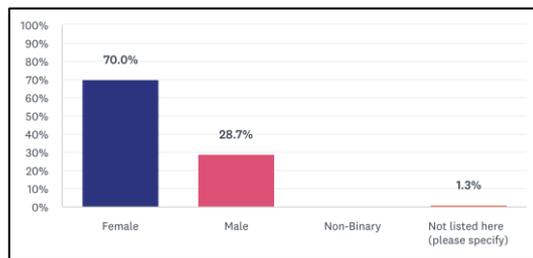


What is your gender? (optional)

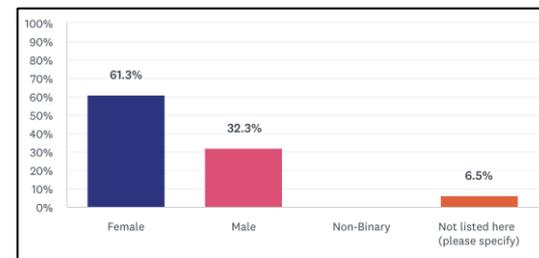
Active Donors
(164 answered, 15 skipped)



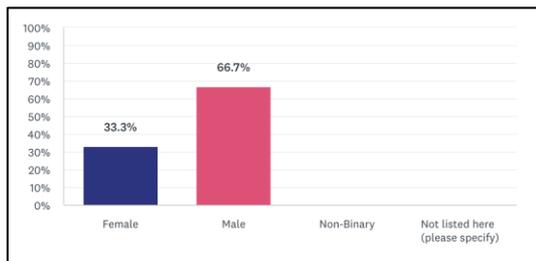
Lapsed Donors
(80 answered, 15 skipped)



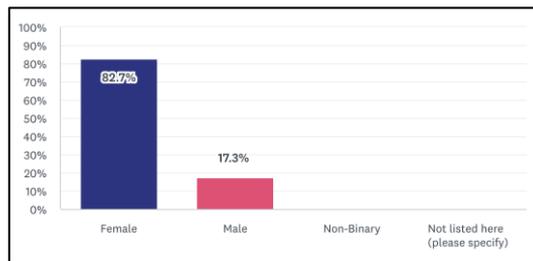
Lapsed 3+ Donors
(31 answered, 7 skipped)



Prospects
(3 answered, 0 skipped)



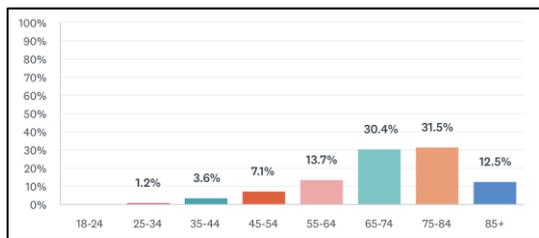
Employee Donors
(260 answered, 58 skipped)



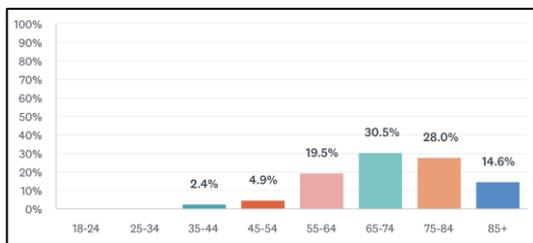
- All personas skewed **Female** except Prospects
- Lapsed, Lapsed 3+ and Employee Donors are overwhelmingly Female

What is your age? (optional)

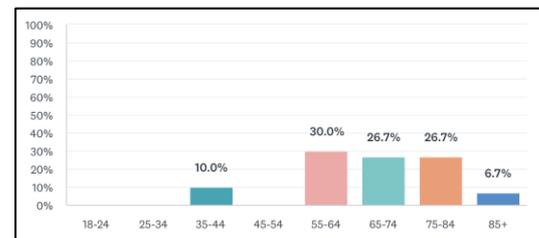
Active Donors
(164 answered, 15 skipped)



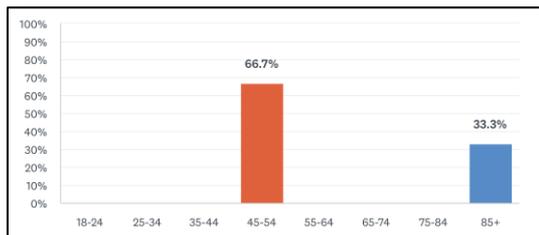
Lapsed Donors
(82 answered, 13 skipped)



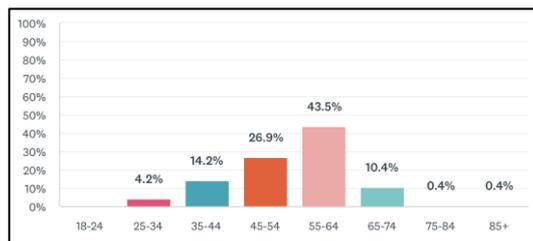
Lapsed 3+ Donors
(31 answered, 7 skipped)



Prospects
(3 answered, 0 skipped)



Employee Donors
(260 answered, 58 skipped)

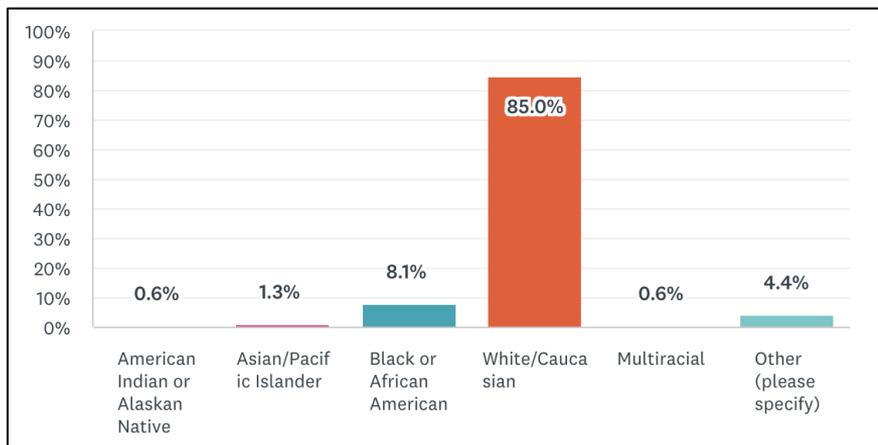


- Donors are overwhelmingly 65+, except Employees and Prospects
 - 74.4% of Active Donors are 65+
 - 73.1% of Lapsed Donors are 65+
 - 60.1% of Lapsed 3+ Donors are 65+
 - 33.3% of Prospects are 65+
 - 11.2% of Employees are 65+
- Active Donors skew even older, to 75+

What race best describes you? (optional) + What is your ethnicity? (optional)

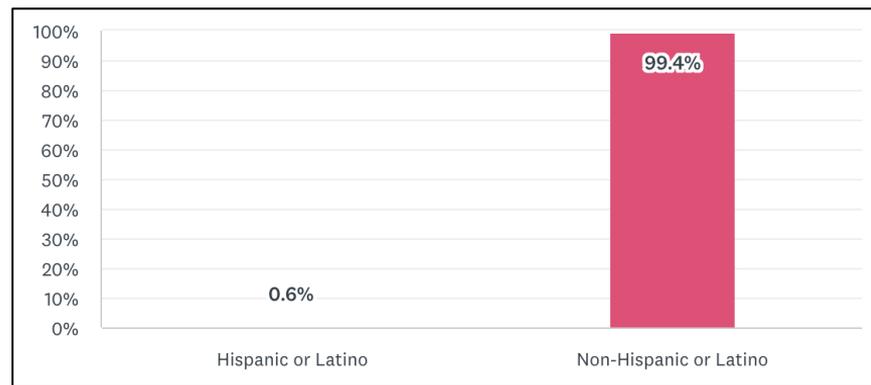
Active Donors

(164 answered, 15 skipped)



Active Donors

(168 answered, 11 skipped)





Miscellaneous Questions + Reporting

Demographic Questions

- 466 respondents provided preferred email address
- 473 respondents provided preferred phone number
- 475 respondents provided preferred addressee
- 471 respondents provided preferred salutation

What inspires you to support the mission of MetroHealth?

- 408 responses; key themes included:
 - MetroHealth's mission and commitment to all
 - Experience working at MetroHealth
 - Direct experiences with care for donors or their loved ones
 - Supporting patients and fellow employees

What could improve your experience as a donor to MetroHealth?

- 330 responses; key themes included
 - "I can't think of anything"
 - More impact reporting and understanding of how funds are being used
 - More financial stability for donors (who wished they could give more)

Would you be willing to hear from a fundraising team member to learn more about your answers?

- 135 responses "Yes" — this is a great group for follow-up and engagement!

We are considering conducting a series of focus groups. Would you be willing to participate?

- 132 responses "Yes"



Survey Results by Secondary Characteristics



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Secondary Characteristics

- **Mid-Level Donors**
- **Major Donors**
- **One-Time Donors**
- **Donors in Target Zip Codes**
- **iWave 4s**
- **People in Portfolios**

Secondary Characteristics

	Mid-Level Donors (n=78)	Major Donors (n=21)	One-Time Donors (n=91)	Donors in Target Zip Codes (n=72)	iWave 4s (n=16)	People in Portfolios
Persona breakdown	36% Active 13% Lapsed 6% Lapsed 3+ 45% Employees	43% Active 14% Lapsed 5% Lapsed 3+ 38% Employees	10% Active 16% Lapsed 11% Lapsed 3+ 63% Employees	32% Active 16% Lapsed 7% Lapsed 3+ 45% Employees	75% Active 25% Lapsed	52% Active 12% Lapsed 3% Lapsed 3+ 33% Employees

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Why support MetroHealth	1. Mission to serve all (74%) 2. Cleveland community (44%)	1. Mission to serve all (86%) 2. Cleveland community (52%) 3. Experience with caregiver (48%)	1. Mission to serve all (66%) 2. Cleveland community (34%)	1. Mission to serve all (67%) 2. Cleveland community (29%) 3. Experience with caregiver (26%)	1. Mission to serve all (94%) 2. Experience with caregiver (56%)	1. Mission to serve all (78%) 2. Cleveland community (43%)

Secondary Characteristics

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Top fundraising priorities	1. Health Equity + Research/ Education (62% each)	1. Health Equity + Research/ Education (71% each)	1. Health Equity (57%) 2. Research/ Education (39%)	1. Health Equity (56%) 2. Research/ Education (46%)	1. Health Equity (75%) 2. Research/ Education (31%)	1. Health Equity (63%) 2. Research/ Education (60%)

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Next year, most likely to	Repeat gift	Repeat gift	Repeat gift or Give through MH Event	Repeat gift	Repeat gift	Repeat gift



Secondary Characteristics

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Most likely to support	<ol style="list-style-type: none">1. Schools + Education2. Faith-Based Charities	<ol style="list-style-type: none">1. Schools + Education2. Faith-Based Charities	<ol style="list-style-type: none">1. Faith-Based Charities2. Schools + Education	<ol style="list-style-type: none">1. Faith-Based Charities2. Schools + Education	<ol style="list-style-type: none">1. Schools + Education2. Arts + Culture	<ol style="list-style-type: none">1. Schools + Education2. Faith-Based Charities

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MetroHealth in Estate Plan	3% (n=2)	24% (n=5)	3% (n=3)	3% (n=2)	25% (n=4)	15% (n=14)

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MetroHealth in Estate Plan	3% (n=2)	24% (n=5)	3% (n=3)	3% (n=2)	25% (n=4)	15% (n=14)
Gender	50% female 49% male 1% other	40% female 60% male	73% female 27% male	66% female 34% male	40% female 60% male	45% female 54% male 1% other

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Preferred Contact for Financial Asks	Email	Email	Email	Mail + Email	Mail	Email



WHAT HAPPENED NEXT?
Opportunities for
Annual Giving,
Pipeline Development +
Moves Management





Opportunities for Growth

Annual Giving + Communications

- Segment by Key Audiences
- Speak Uniquely to Key Audiences
- Use What Motivates Donors to Give

Pipeline Development + Moves Management

- Retain Current Donors
- Build Your Mid-Level Program
- Identify + Cultivate Planned Giving Prospects
- Acquire New Donors
- Find Your Untapped Potential

Our goal is to **maximize moves management at all levels** of the pyramid with personalized and specific calls-to-action for each segment!



ANNUAL GIVING + COMMUNICATIONS

Segment by Key Audiences

Every communication should include Core Audiences, with variable messages for 4 key segments. Add in other audiences as applicable.

Core Audiences

- **Active Donors**
- **Lapsed and Lapsed 3+ Donors**
- **Prospects**
- **Mid-Level Donors**

Other Audiences

- **Employees**
- **Board**
- **Physicians + Medical Staff**
- **Select Patients**
- **Partners + Affiliates**
- **Volunteers + Retirees**



ANNUAL GIVING + COMMUNICATIONS

Speak Uniquely to Key Audiences

Across All Personas

- Respondents indicated they are most likely to repeat their most recent gift
- Respondents preferred to give via mail, but wish to be asked via email

We must speak to donors uniquely to invite them to take the best next step based on their giving persona.

Key Insights

- **Clear Calls-to-Action:** Use variable paragraphs, suggested gift amounts and/or dynamic gift arrays within 4 core segments (active, mid-level, lapsed, prospects) to customize your ask.
- **Manage Moves:** We need to inspire and invite people to take the next step through cultivation and stewardship—along with best practices like monthly giving and planned giving reminders.
- **Echo with Emails:** Survey responses may reflect how donors are used to hearing from you. Activate email as a cost-effective, efficient way to reach and remind donors—and make giving easy. Then, continue testing to see which personas are adopting digital.



ANNUAL GIVING + COMMUNICATIONS

Use What Motivates Donors to Give

Across All Personas

- The top reason donors support MetroHealth is your mission to care for all
- Health equity is the fundraising priority that resonated most
- Community impact stories and health education are the most desired philanthropic information from MetroHealth

Calls-to-action should differ, but many other messaging preferences are shared across groups.

Key Insights

- **Message Mission:** Emphasize care for all and health equity initiatives
- **Share Stories:** Show impact with an individualized, local focus
- **Inspire with Impact:** Respondents want to feel more in the know; illustrate impact with memorable stories and greater frequency



PIPELINE DEVELOPMENT + MOVES MANAGEMENT

Retain Current Donors

Restart Annual Giving Program!

- Retain active donors and recapture lapsed donors by asking multiple times throughout the year with unique messaging to each group
- 77.4% of donors have made 10 or fewer gifts over their lifetime, especially Annual and Mid-Level donors. Get them to give again by asking!

Invest in multi-channel communications by adding email to every appeal

- Giving increases by 74-132% when using print and email

Retain one-time donors

- 36.4% of donors have only given once. Of those, 88% lapsed 1-3+ years ago—it's not too late to retain the others!
- Use email to cultivate and educate donors, especially one-time donors (we have email addresses for 73% of one-time active donors!)
- Activate extra stewardship touchpoints for one-time/first-time donors

Follow up with every donor who said they want to connect!

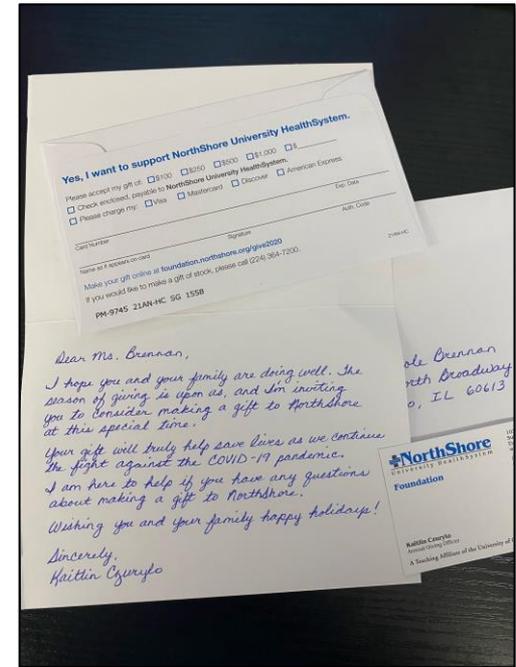
- It's a great opportunity to build relationships (make sure to respect contact preferences)

PIPELINE DEVELOPMENT + MOVES MANAGEMENT

Build Your Mid-Level Program

Prioritize and Reconnect with Mid-Level Donors

- ~175 donors gave in the mid-level range in 2022 – and 122 Mid-Level Donors have lapsed (190 including Employees)
- Target Mid-Level Donors uniquely to recapture or uplevel gifts – through mini-proposals, “handwritten” notes or more personalized attention
- Steward these donors through regular eNewsletters, Board Thank-a-Thon calls and customized impact letters
- Consider a Mid-Level Gift Officer





PIPELINE DEVELOPMENT + MOVES MANAGEMENT

Acquire New Donors

Reevaluate Grateful Patient Program

- Consider investing in AI to make intelligent decisions on which patients to target
- Test targeted patient list vs. purchased list of higher ed and religious donors in Cleveland

Uplevel your Employee Giving Campaign and Annual Giving Programs

- New donor volumes come from Annual Giving and Employee Giving

- Explore **Peer-to-Peer opportunities** connected to a Giving Day and Board Friend-raising
- **Collect emails** through an email pop-up box and at events
 - Add all to eNews audience to cultivate
 - Monitor most engaged prospects and target via direct mail
- **Exceptional stewardship** will be critical with this group!



PIPELINE DEVELOPMENT + MOVES MANAGEMENT

Find Untapped Potential

Employee Annual Donors

- This is a loyal and young audience, ages 35-65—can be nurtured into longer-term donors

Employee Mid-Level and Major Donors

- A lower percentage of these donors are assigned to portfolios than other Mid-Level and Major Donors—are there opportunities to review?

New Donors

- Review for capacity (92.5% of new donors are iWave 3s-4s), steward and build relationships

iWave 4s

- Only 30% of iWave 4s are in portfolios, and Strong Planned Giving prospects are missing
- iWave 3s + 4s with RFM of 1-2 are “hidden gems”—ask them for a gift!
- iWave 3s + 4s with RFM of 3-4 are primed for upleveling

Survey Responses

- Follow up with people who mentioned DAFs, increasing gifts or new notice of a planned gift!
- Connect to folks who were open to a focus group (“Ask for an opinion, get a gift!”)

Final Takeaways



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What We Learned + What's Next

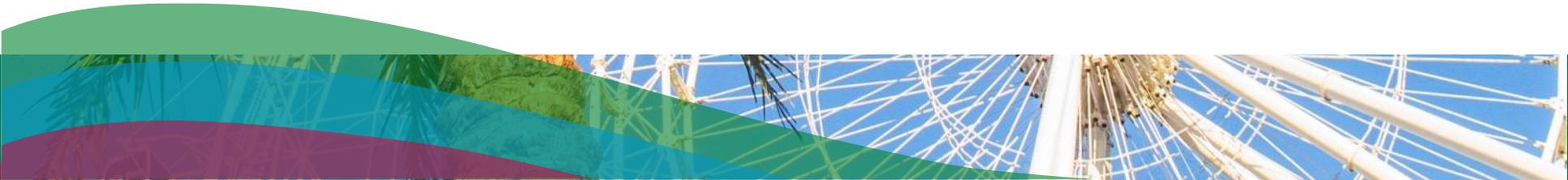
- We started this because we were curious to know the mindset of our donors, especially given recent changes in leadership
- **We learned that:**
 - We live our mission: donors' interests in mission and health equity affirmed what they believe in
 - Donors want to know their generosity is having an impact
 - People say financial issues are an issue—and while there's not a lot you can do, it's important to keep communicating with them
- **These findings:**
 - Helped inform the tone of immediate outreach pieces to donors—as well as where we're going in the future
 - Supported broad communications and relationship building with major donors
 - Allowed us to contact estate plans immediately
 - Emphasized the importance of asking and listening
 - Will be used as a reference and future resource for the next 1-2 years—and help us fill our prospect pipeline!



Questions + Discussion



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Thank you!



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