



American Health Society

Mindset Segmentation Analysis Comprehensive Findings

*All data and client information is redacted



EXECUTIVE SUMMARY.

Key Audience Insights

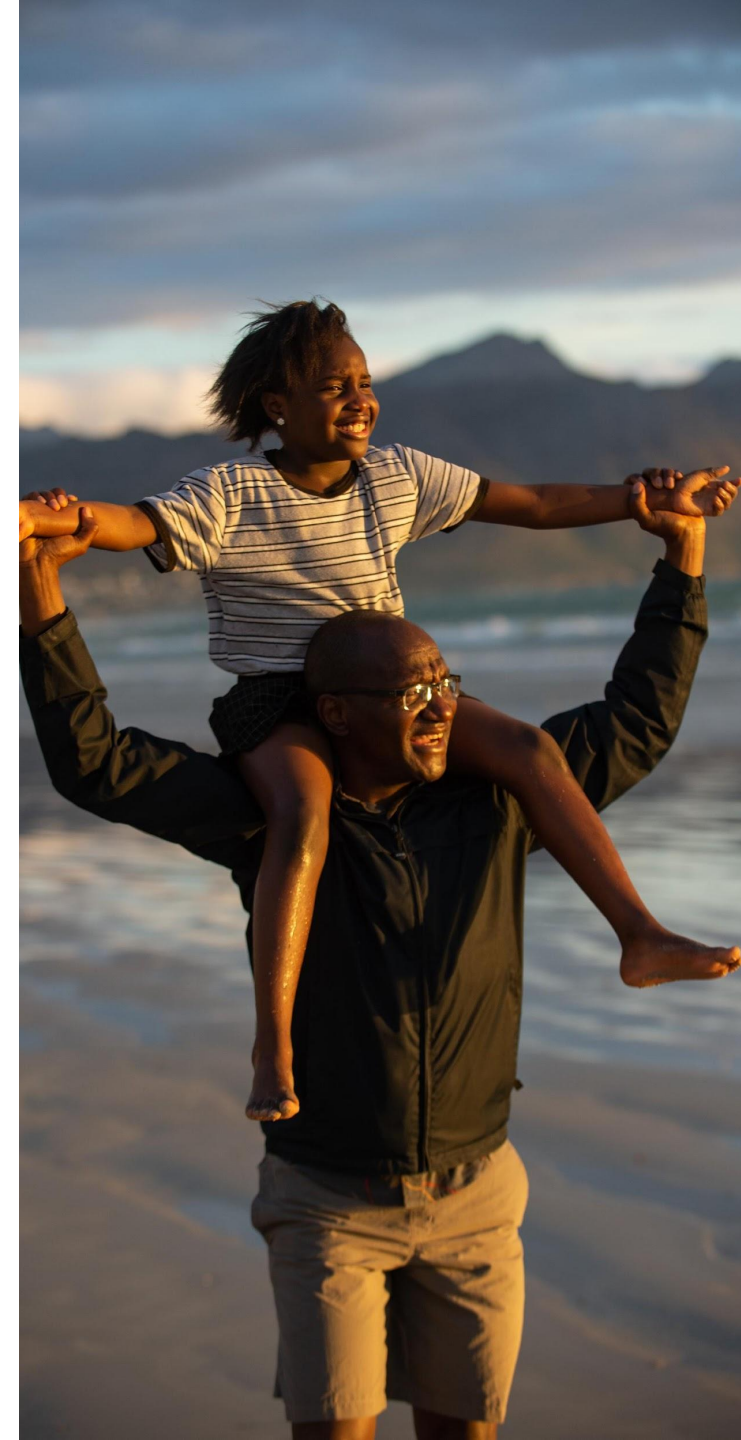
- **Five key audiences** identified to describe the complete AHS constituency. One audience segment identified to describe prospects.
- Distinct differences and descriptors emerged for each audience.

Applying in Strategy

- Greater “connection” to AHS yields greater support – through both interactions and giving.
- High potential audiences identified where strengthened connection can drive greater constituent value.

Accelerating Change

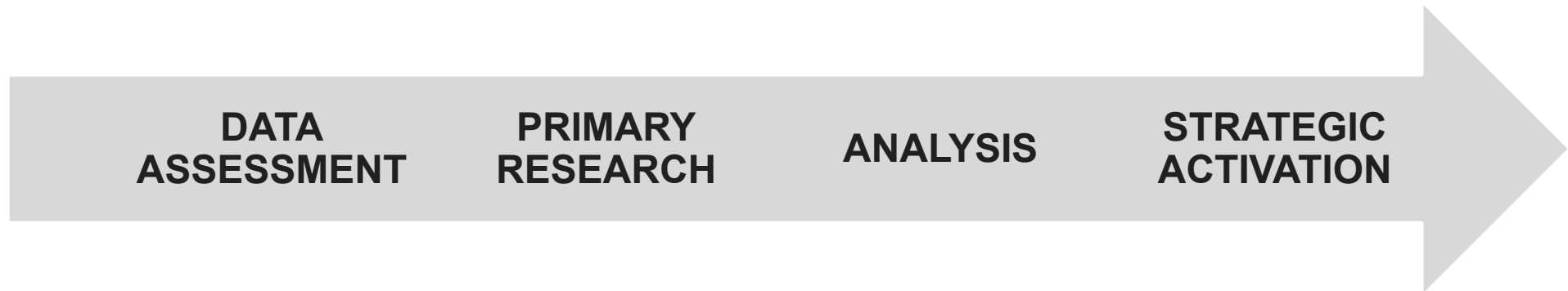
- All AHS constituents will be mapped to audience segments.
- Journey mapping workshops and campaign pilots will build connection.



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APPROACH

AUDIENCE SEGMENTATION



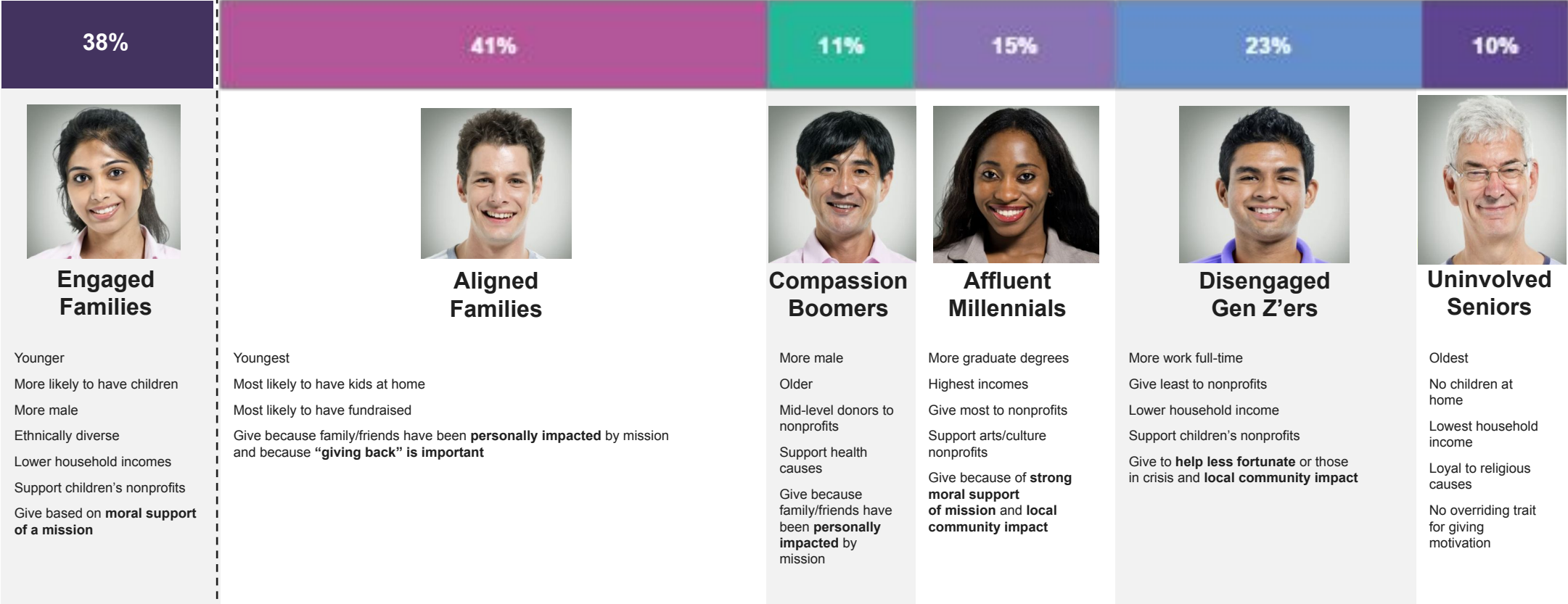
KEY AUDIENCE

SEGMENT SUMMARY

- Five key audience segments were identified, each with discrete profiles. **Aligned Families** represent much of the file.
- General population donors to healthcare who are **very likely** to give time or money to AHS in the next 12 months are called **Engaged Families**.

PROSPECT UNIVERSE

AHS CONSTITUENT UNIVERSE

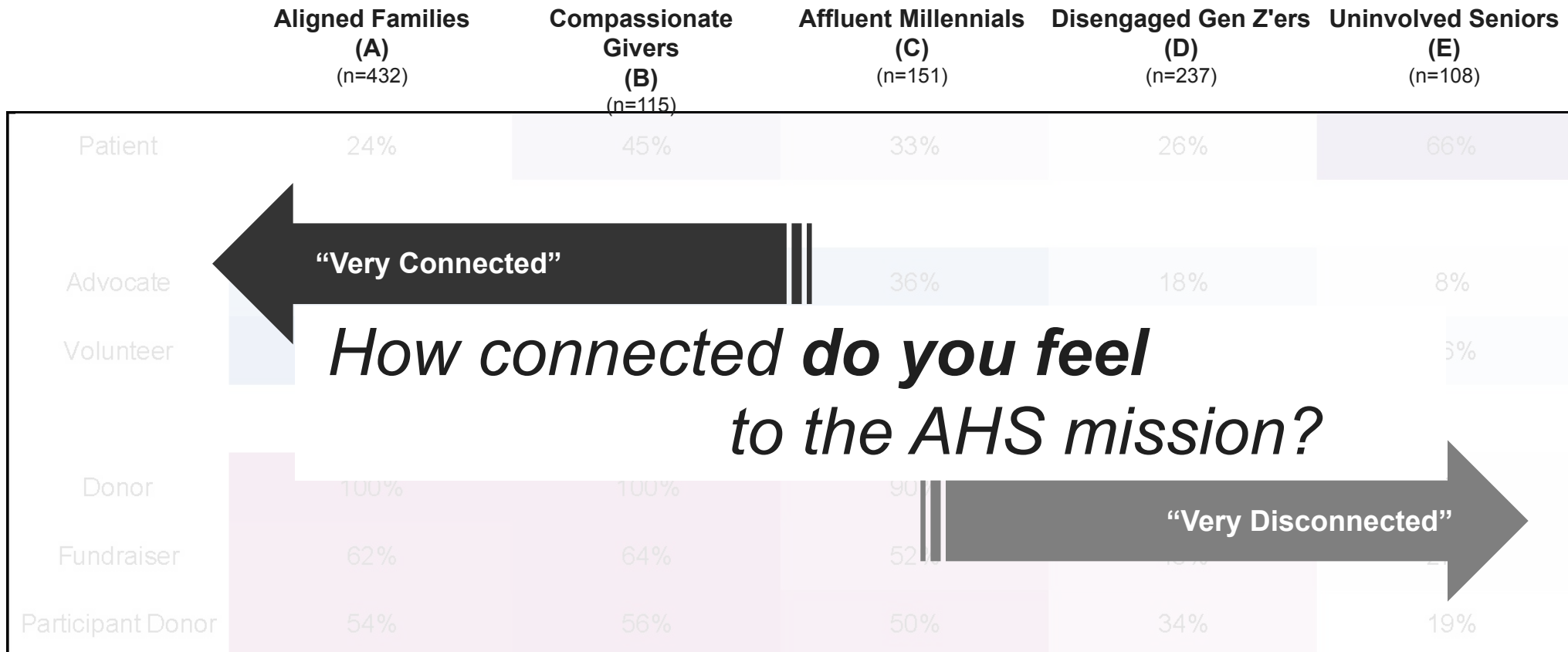


Distinguishing attributes from broader population

CONNECTION TO AHS

SELF-DESCRIBED

- **Level of connection** is a meaningful way to group and organize the AHS constituency.
- **Aligned Families** feel most connected while **Uninvolved Seniors** feel the least.

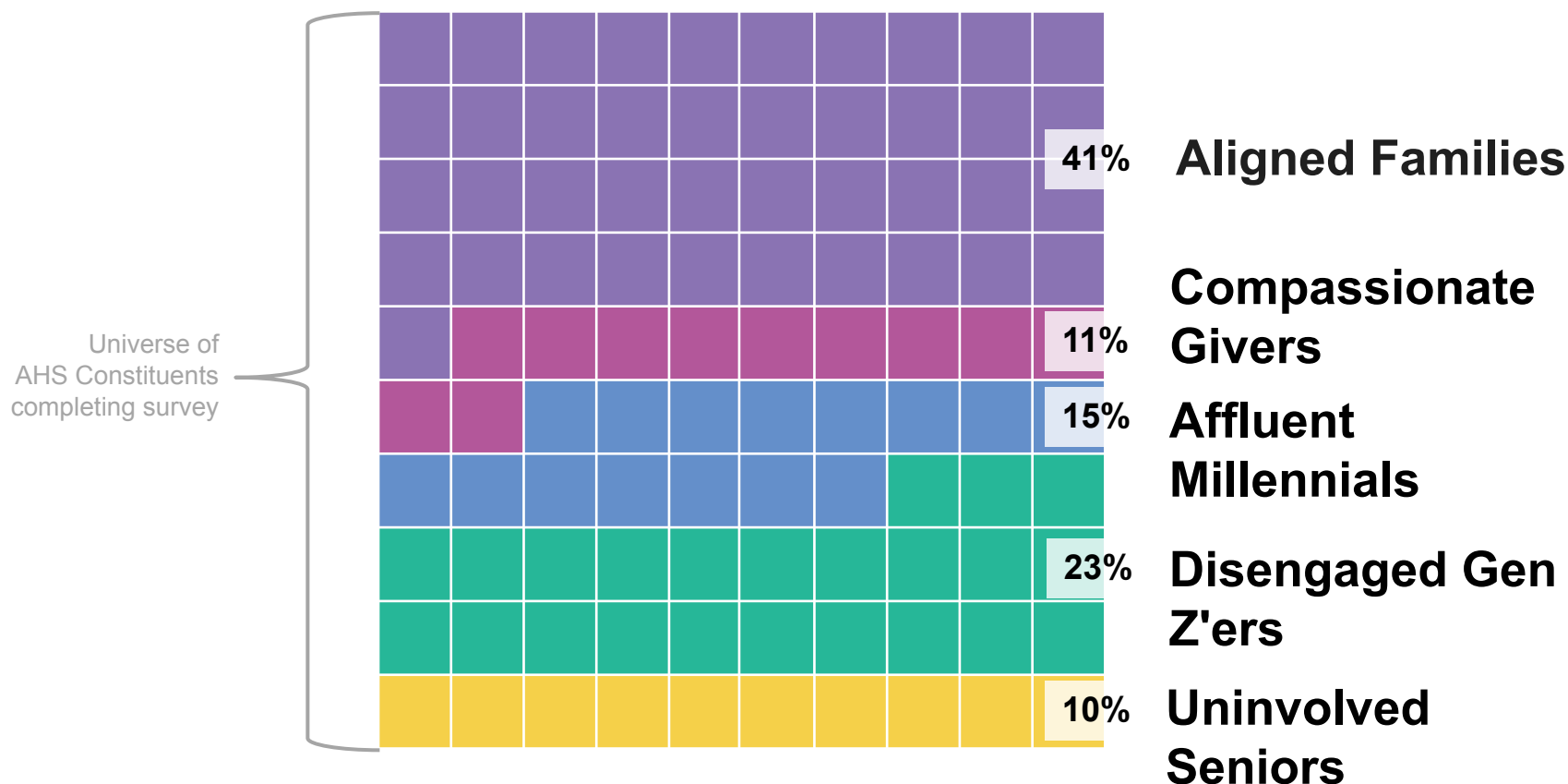


Q95. Which of the following statements best describes how "connected" you feel to the American Health Society. By "connected", we mean the degree to which you feel you are part of AHS's mission. (Single Response)

KEY AUDIENCE

AHS CONSTITUENCY SEGMENT INSIGHTS

Five key audience segments were identified, each with discrete profiles. **Aligned Families** represent much of the file – while distinct attributed differentiated **Affluent Millennials**, **Compassion Givers** and **Uninvolved Seniors** from other audiences.



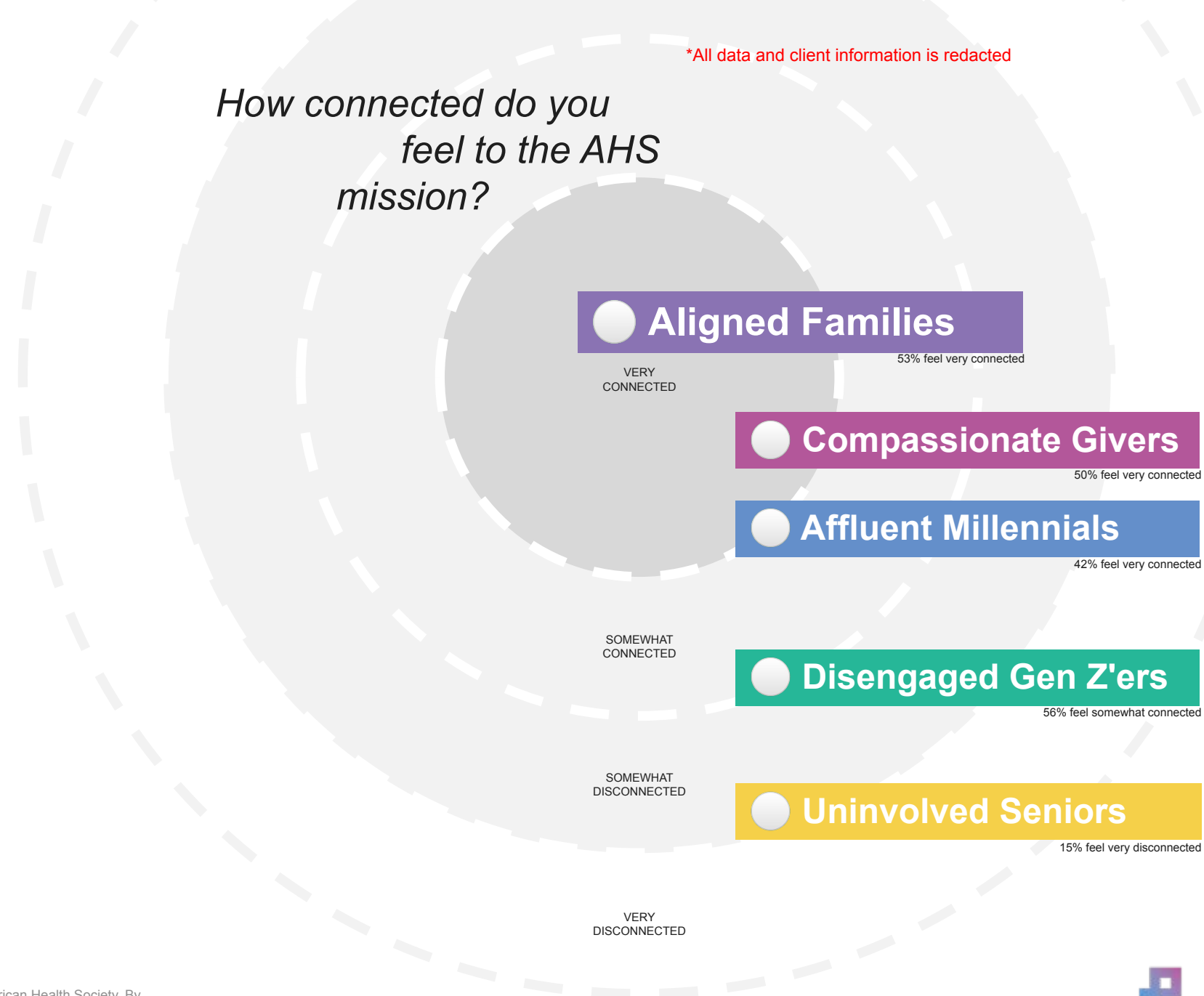
Variables that have a significant impact on the segment formation and used to define the segment are: Age, amount donated to non-religious nonprofits past 12 months, number of times donated to non-religious nonprofits past 12 months, causes supported financially in the past 12 months, donations to AHS, AHS support, connection to AHS, children <18 in household, employment status, and household income.

LEVEL OF CONNECTION TO AHS MISSION

- **Level of connection** is a meaningful way to group and organize the AHS constituency.
- Constituents that feel “very connected” interact more frequently and at higher values than those that feel disconnected.
- Note that level of connection is not the same thing as *mission* connection – there are constituents who are patients who report low level of connection.

How connected do you
feel to the AHS
mission?

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ALLIED FAMILIES

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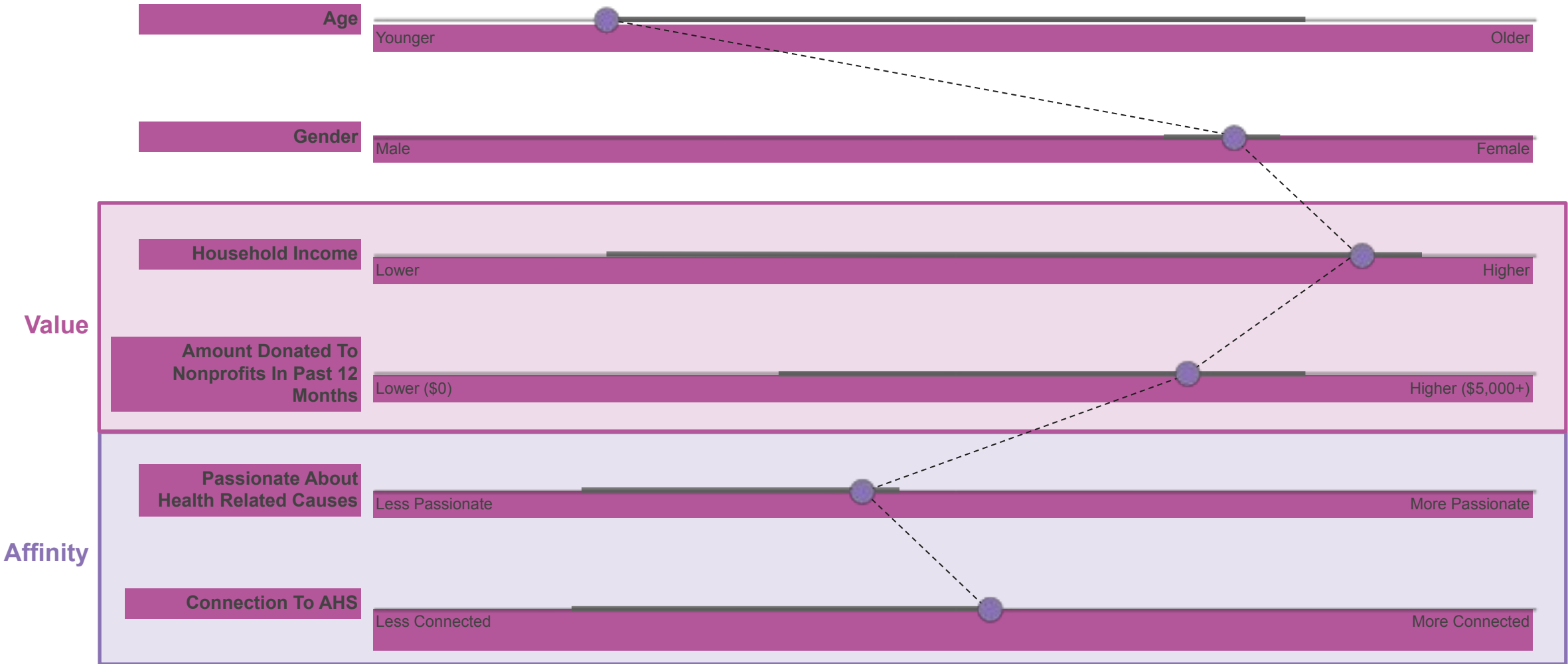
At age 42 with three young kids, I was diagnosed with a type of disease for which there currently is no cure.

I need to do all I can do to help find that cure. Working with AHS makes me feel like I am doing something to help that.”

ALIGNED FAMILIES

VARIABLE MAP

Aligned Families are younger and connected to AHS the most.



Aligned Families

PROFILE SUMMARY

*All data and client information is redacted

Aligned Families are more likely to have fundraised for a nonprofit, specifically a virtual event or a fundraiser they created, and to be prompted to donate by a fundraiser.



Key Demographics

GENDER		LEVEL OF EDUCATION	
Female	74%	Less than high school	1%
Male	26%	Completed high school	9%
Other	0%	College degree	46%
		Graduate degree	42%
AGE		Attended vocational/technical school	2%
18-34	10%	EMPLOYMENT STATUS	
35-44	22%	Working full-time	74%
45-54	40%	Working part-time	11%
55-64	25%	Self-employed	6%
65 or older	3%	Retired	0%
		Other	9%
MARITAL STATUS		ANNUAL HH INCOME	
Married/Partnered	70%	Less than \$50k	12%
Single, never married	19%	\$50k – \$69,999	9%
Other	11%	\$70k – \$99,999	16%
		\$100k– \$124,999	15%
CHILDREN IN HH		\$125k+	48%
Yes	40%	RACE/ETHNICITY	
No	60%	White	88%
		Black or African American	4%
IDENTIFY AS LGBT		Hispanic	9%
Yes	3%	Asian	4%
No	97%	Other	4%



General Donation Key Characteristics

AMOUNT DONATED TO NONPROFITS PAST 12 MONTHS		PRIMARY REASON FOR DONATING TO NONPROFITS		GENERAL DONATION PRACTICES – % STRONGLY AGREE	
\$0	0%	I, my friends, or my family members have personally been impacted by the organization's mission	35%	Donating to nonprofits and charities is my way of helping others	55%
\$1 – \$49	3%	To honor someone who passed away or someone living	11%	Donating to local nonprofits and charities is important to me	52%
\$50 – \$99	4%	Desire to help the less fortunate, or those in need or in crisis	13%	Donating to nonprofits and charities is my way of giving back to organizations that have personally impacted my life	47%
\$100 – \$249	18%	Strong moral/personal support for an organization's mission	14%	I thoroughly research nonprofits and charities prior to making my donations	23%
\$250 – \$499	19%	Giving back is important in my family/I want to show my children the value of giving back	10%	Financial constraints prevent me from donating to organizations that are important to me	10%
\$500 – \$999	17%	Friend, family, or colleague asked me to support the organization	5%	Donating to well-known national or global nonprofits and charities makes me more comfortable	18%
\$1,000 – \$4,999	25%	The impact the organization has on my local community	5%	CAUSES MOST PASSIONATE ABOUT	
\$5,000 or above	14%	The organization's ability to make a widespread or global impact	7%	Health/Medical	42%
EVER FUNDRAISED		DONATION PROMPTS		Charitable causes	17%
Yes	89%	I generally plan my donation to the organization in advance	24%	Children's causes	14%
No	8%	I donate when attending a fundraiser or event	22%	Religious causes	16%
Not sure	3%	I donate sporadically when I'm financially able	22%	Arts & Culture	6%
TYPES OF FUNDRAISERS		I make my donations when friends or family ask me to	15%		
Walk	62%	I make my donations when I'm contacted by the organization	5%		
Virtual event	38%	I donate when asked in the moment	5%		
Fundraiser you created	37%	CAUSES DONATED TO			
Run	31%	Health/Medical	82%		
Memorial/tribute	24%	Charitable causes	60%		
Endurance event	18%	Children's causes	44%		
Biking event	12%	Religious causes	36%		
		Animal welfare	26%		
		Veterans	23%		
		Arts & Culture	6%		



Compassion Givers

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We've dedicated ourselves to supporting AHS based on the personal connection my family has with health disparities .

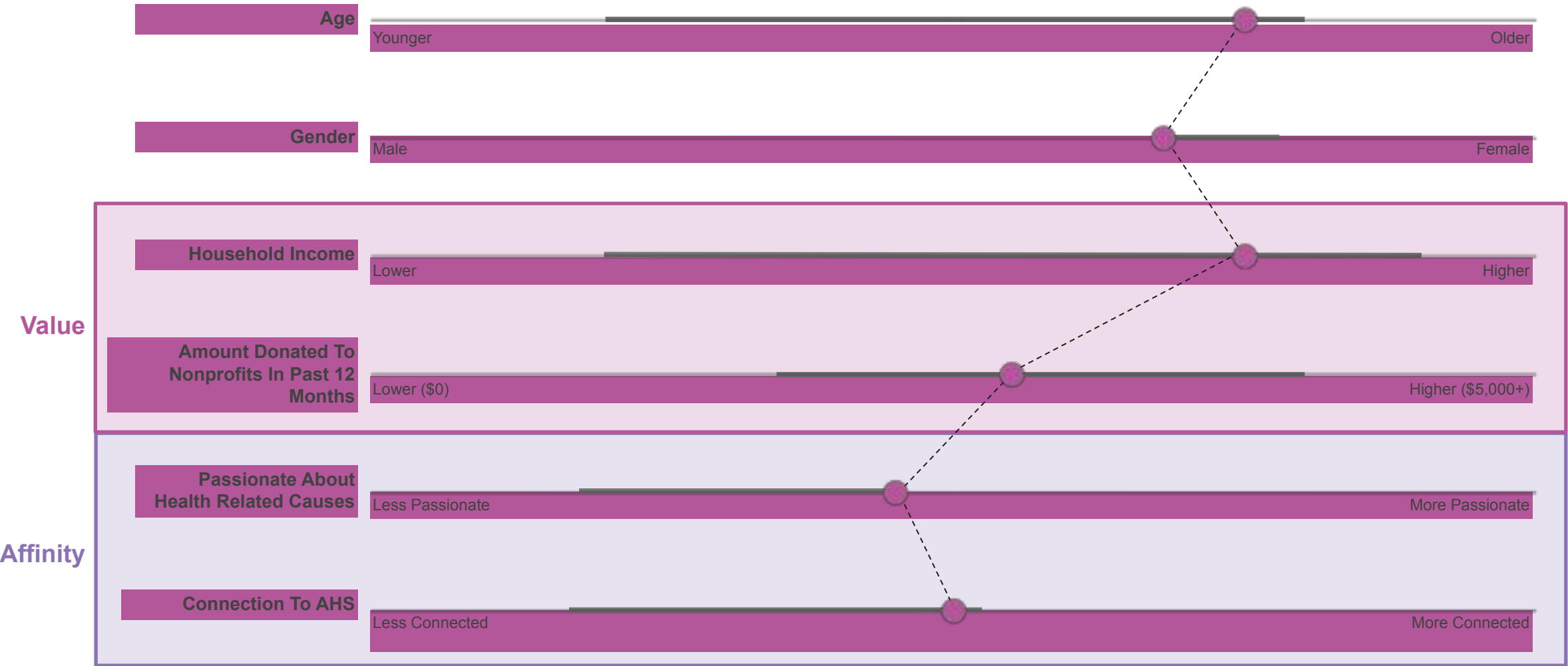
The Moonlight 5K Classic is well-known with a strong reputation. When I ask people to donate, they've heard of it. It's easy to fundraise.

It's worth my time and energy to participate and I'll continue to do all that I can.”

COMPASSION GIVERS

VARIABLE MAP

Compassion Givers are most passionate about health-related causes and feel very connected to the AHS mission.



Compassion Givers

PROFILE SUMMARY

*All data and client information is redacted

Compassion Givers are more often older and more passionate about health/medical causes.



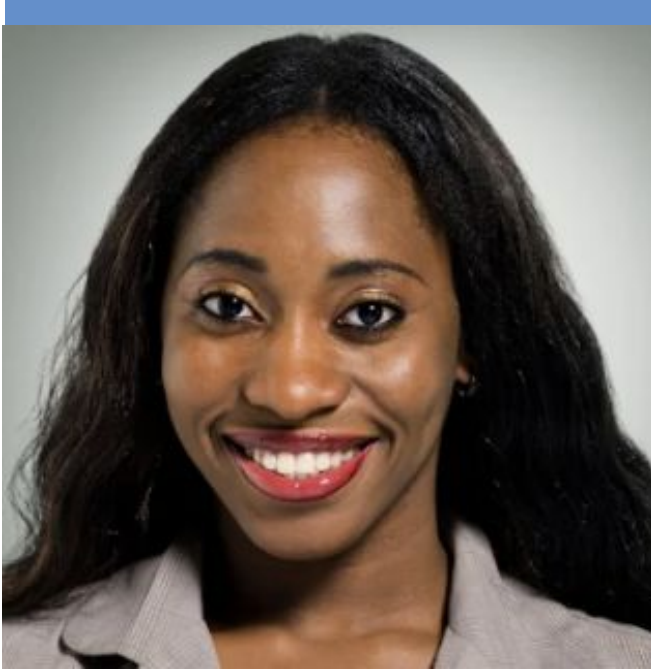
Key Demographics

GENDER		LEVEL OF EDUCATION	
Female	68%	Less than high school	1%
Male	32%	Completed high school	10%
Other	0%	College degree	40%
		Graduate degree	45%
AGE		Attended vocational/technical school	4%
18-34	0%	EMPLOYMENT STATUS	
35-44	0%	Working full-time	0%
45-54	4%	Working part-time	5%
55-64	23%	Self-employed	3%
65 or older	73%	Retired	88%
		Other	4%
MARITAL STATUS		ANNUAL HH INCOME	
Married/Partnered	74%	Less than \$50k	14%
Single, never married	8%	\$50k – \$69,999	17%
Other	18%	\$70k – \$99,999	19%
		\$100k– \$124,999	10%
CHILDREN IN HH		\$125k+	40%
Yes	3%	RACE/ETHNICITY	
No	97%	White	94%
		Black or African American	3%
IDENTIFY AS LGBT		Hispanic	4%
Yes	3%	Asian	2%
No	97%	Other	1%



General Donation Key Characteristics

AMOUNT DONATED TO NONPROFITS PAST 12 MONTHS		PRIMARY REASON FOR DONATING TO NONPROFITS		GENERAL DONATION PRACTICES – % STRONGLY AGREE	
\$0	0%	I, my friends, or my family members have personally been impacted by the organization's mission	39%	Donating to nonprofits and charities is my way of helping others	57%
\$1 – \$49	0%	To honor someone who passed away or someone living	13%	Donating to local nonprofits and charities is important to me	35%
\$50 – \$99	0%	Desire to help the less fortunate, or those in need or in crisis	13%	Donating to nonprofits and charities is my way of giving back to organizations that have personally impacted my life	45%
\$100 – \$249	14%	Strong moral/personal support for an organization's mission	14%	I thoroughly research nonprofits and charities prior to making my donations	23%
\$250 – \$499	19%	Giving back is important in my family/I want to show my children the value of giving back	3%	Financial constraints prevent me from donating to organizations that are important to me	4%
\$500 – \$999	24%	Friend, family, or colleague asked me to support the organization	9%	Donating to well-known national or global nonprofits and charities makes me more comfortable	18%
\$1,000 – \$4,999	32%	The impact the organization has on my local community	1%		
\$5,000 or above	11%	The organization's ability to make a widespread or global impact	8%	CAUSES MOST PASSIONATE ABOUT	
EVER FUNDRAISED		DONATION PROMPTS		Health/Medical	45%
Yes	84%	I generally plan my donation to the organization in advance	28%	Charitable causes	12%
No	11%	I donate when attending a fundraiser or event	15%	Children's causes	7%
Not sure	5%	I donate sporadically when I'm financially able	19%	Religious causes	19%
TYPES OF FUNDRAISERS FUNDRAISED FOR		I make my donations when friends or family ask me to	10%	Arts & Culture	1%
Walk	64%	I make my donations when I'm contacted by the organization	14%		
Virtual event	25%	I donate when asked in the moment	4%		
Fundraiser you created	18%				
Run	25%				
Memorial/tribute	27%				
Endurance event	25%				
Biking event	12%				
CAUSES DONATED TO					
Health/Medical	87%				
Charitable causes	58%				
Children's causes	38%				
Religious causes	43%				
Animal welfare	23%				
Veterans	29%				
Arts & Culture	2%				



Affluent Millennials

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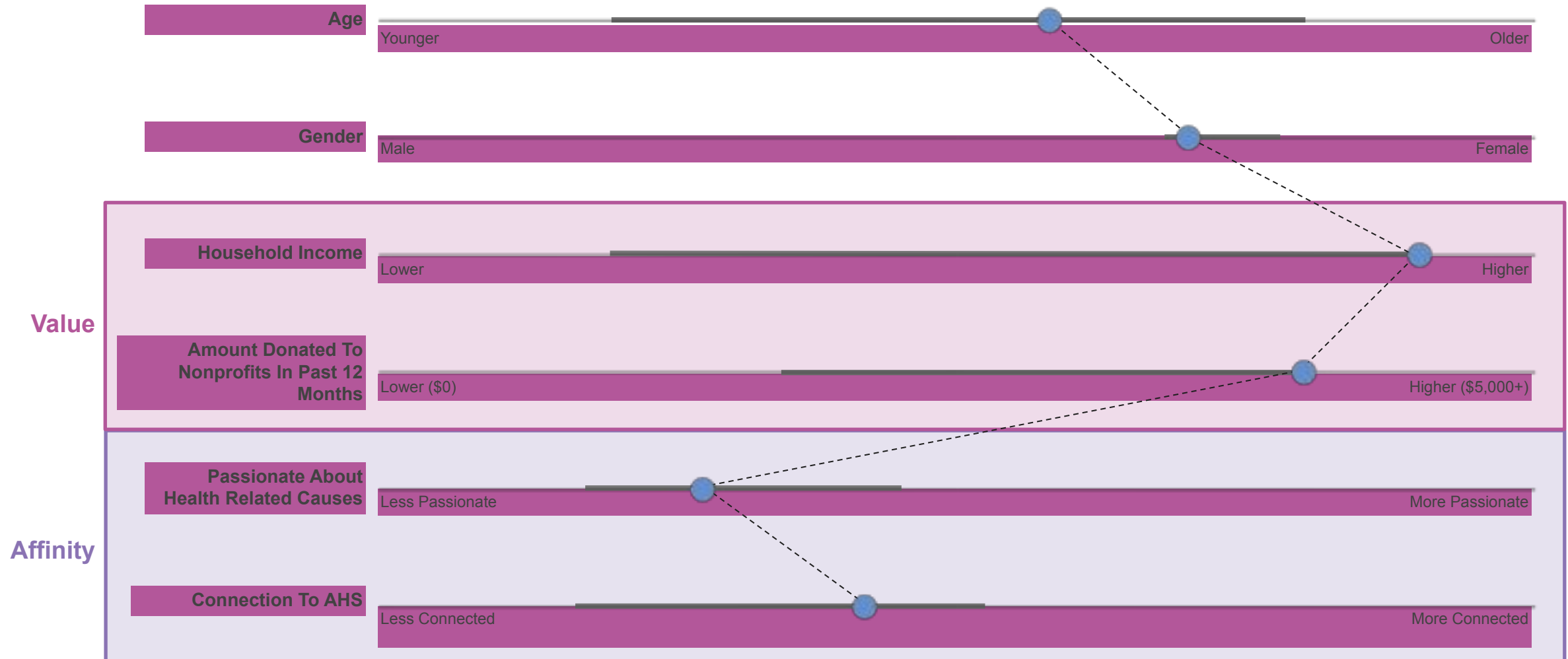
My daughter participated in the AHS Youth Unlimited campaign, so I supported her in meeting her fundraising goal.

I've donated to AHS before on behalf of friends and family for fundraising events, and in memory of those who have passed away from diseases.

AFFLUENT MILLENNIALS

VARIABLE MAP

Affluent Millennials have the highest household income and are the most generous with their giving.



Affluent Millennials

PROFILE SUMMARY



Key Demographics

GENDER		LEVEL OF EDUCATION	
Female	70%	Less than high school	0%
Male	28%	Completed high school	6%
Other	2%	College degree	39%
AGE		Graduate degree	54%
18-34	3%	Attended vocational/technical school	1%
35-44	13%	EMPLOYMENT STATUS	
45-54	0%	Working full-time	38%
55-64	35%	Working part-time	9%
65 or older	49%	Self-employed	7%
MARITAL STATUS		Retired	40%
Married/Partnered	67%	Other	6%
Single, never married	13%	ANNUAL HH INCOME	
Other	20%	Less than \$50k	6%
CHILDREN IN HH		\$50k – \$69,999	5%
Yes	10%	\$70k – \$99,999	29%
No	90%	\$100k– \$124,999	11%
IDENTIFY AS LGBT		\$125k+	49%
Yes	5%	RACE/ETHNICITY	
No	95%	White	90%
		Black or African American	3%
		Hispanic	4%
		Asian	4%
		Other	3%



General Donation Key Characteristics

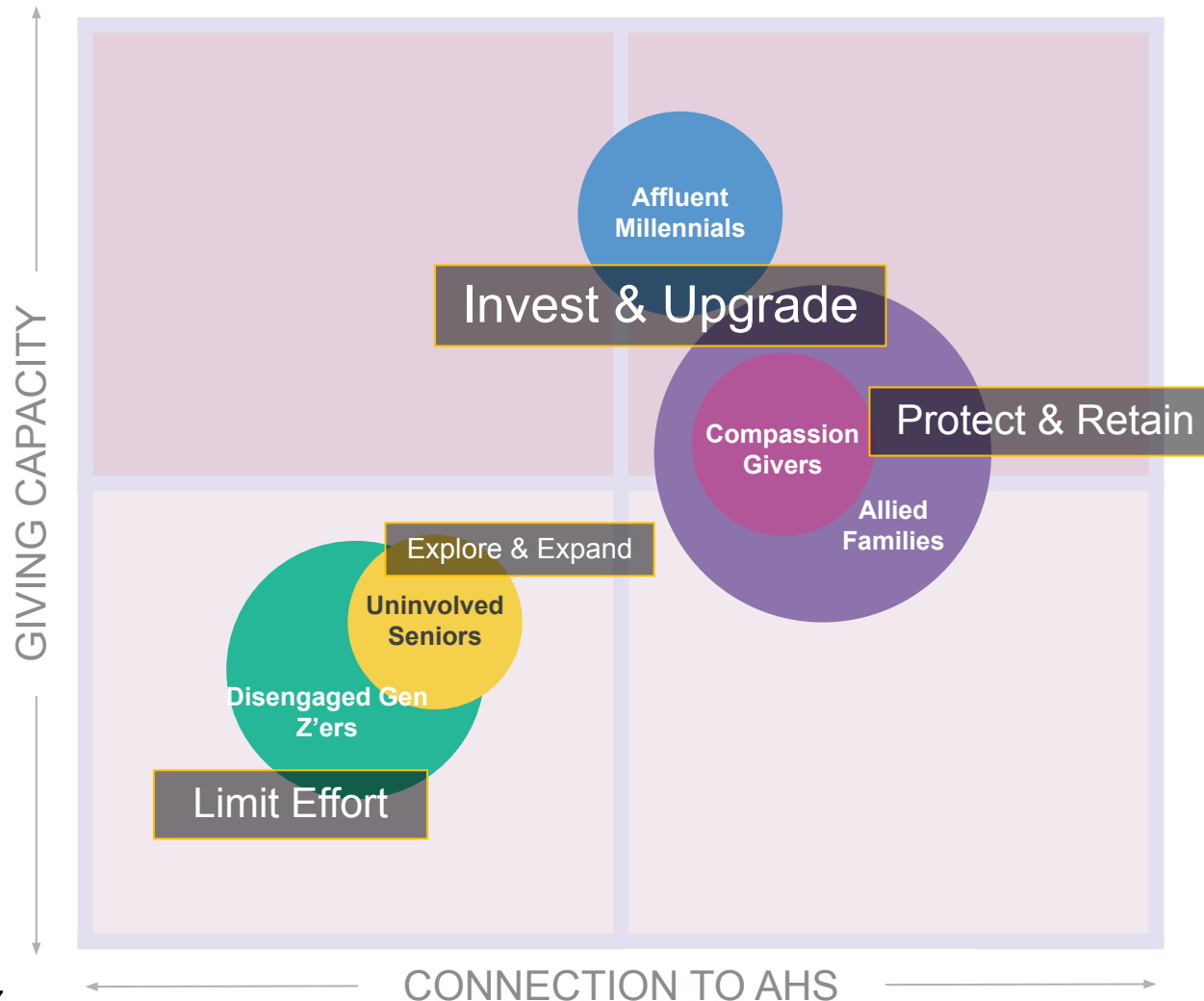
AMOUNT DONATED TO NONPROFITS PAST 12 MONTHS		PRIMARY REASON FOR DONATING TO NONPROFITS		GENERAL DONATION PRACTICES – % STRONGLY AGREE	
\$0	0%	I, my friends, or my family members have personally been impacted by the organization's mission	24%	Donating to nonprofits and charities is my way of helping others	61%
\$1 – \$49	0%	To honor someone who passed away or someone living	9%	Donating to local nonprofits and charities is important to me	61%
\$50 – \$99	1%	Desire to help the less fortunate, or those in need or in crisis	17%	Donating to nonprofits and charities is my way of giving back to organizations that have personally impacted my life	44%
\$100 – \$249	5%	Strong moral/personal support for an organization's mission	24%	I thoroughly research nonprofits and charities prior to making my donations	26%
\$250 – \$499	12%	Giving back is important in my family/I want to show my children the value of giving back	8%	Financial constraints prevent me from donating to organizations that are important to me	8%
\$500 – \$999	21%	Friend, family, or colleague asked me to support the organization	6%	Donating to well-known national or global nonprofits and charities makes me more comfortable	18%
\$1,000 – \$4,999	41%	The impact the organization has on my local community	8%	CAUSES MOST PASSIONATE ABOUT	
\$5,000 or above	20%	The organization's ability to make a widespread or global impact	5%	Health/Medical	28%
EVER FUNDRAISED		DONATION PROMPTS		Charitable causes	31%
Yes	83%	I generally plan my donation to the organization in advance	29%	Children's causes	5%
No	14%	I donate when attending a fundraiser or event	12%	Religious causes	12%
Not sure	3%	I donate sporadically when I'm financially able	18%	Arts & Culture	9%
TYPES OF FUNDRAISERS FUNDRAISED FOR		I make my donations when friends or family ask me to	12%		
Walk	76%	I make my donations when I'm contacted by the organization	12%		
Virtual event	37%	I donate when asked in the moment	3%		
Fundraiser you created	29%	CAUSES DONATED TO			
Run	32%	Health/Medical	76%		
Memorial/tribute	36%	Charitable causes	82%		
Endurance event	24%	Children's causes	40%		
Biking event	17%	Religious causes	48%		
		Animal welfare	37%		
		Veterans	25%		
		Arts & Culture	100%		

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Affluent Millennials are more likely to be higher dollar donors and to donate to a variety of causes in the past 12 months.

GROWING AUDIENCE WALLET SHARE

SEGMENT INSIGHTS



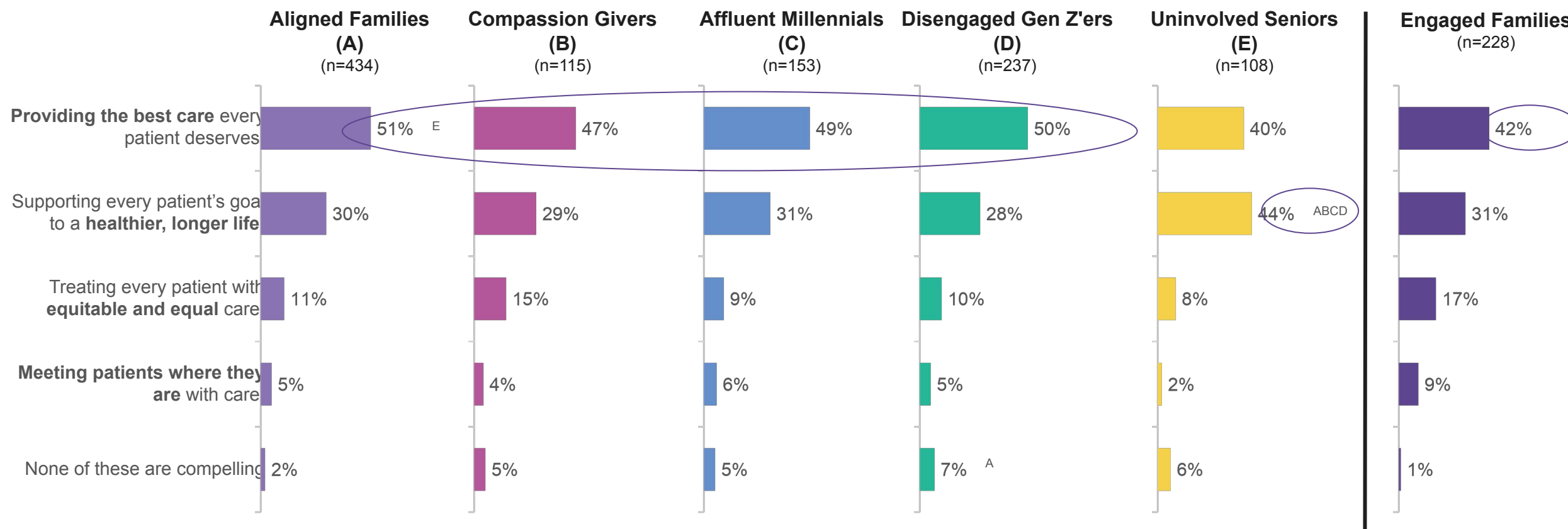
- **Best use** audience strategies should be determined for each audience type – though engagement, participation or financial support.
- By deprioritizing lower wallet opportunities, we can apply more surgical targeting to high potential audiences with existing resources.

Connection – Index of those feeling very connected to the organization. Derived through survey research.

Giving Capacity – Index of estimated average amount of total gifts to nonprofits (non-religious) in past 12 months. Derived through survey research.

MOST COMPELLING STATEMENT

- 'Providing the best care every patient deserves' is the most compelling statement for all segments apart from one.
- **Uninvolved Seniors** are more likely to find 'Helping every disease patient live better, longer' as compelling.

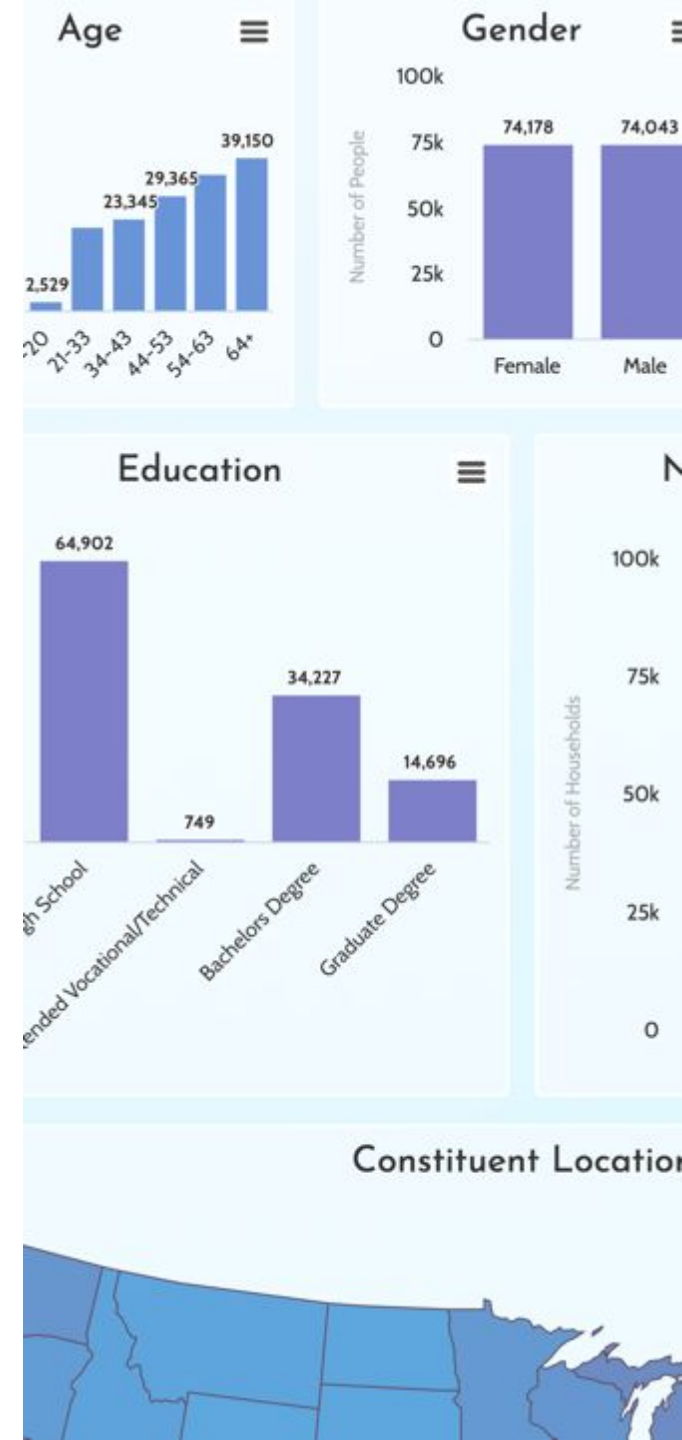


A/B/C/D/E - Indicates significant difference at the 95% confidence level
 C6. Which of the following statements is most compelling to you? (Single Response)

KEY RECOMMENDATION TACTICS

Retention and donor value can be influenced by audience segment through targeted stewardship and upgrade tactics.

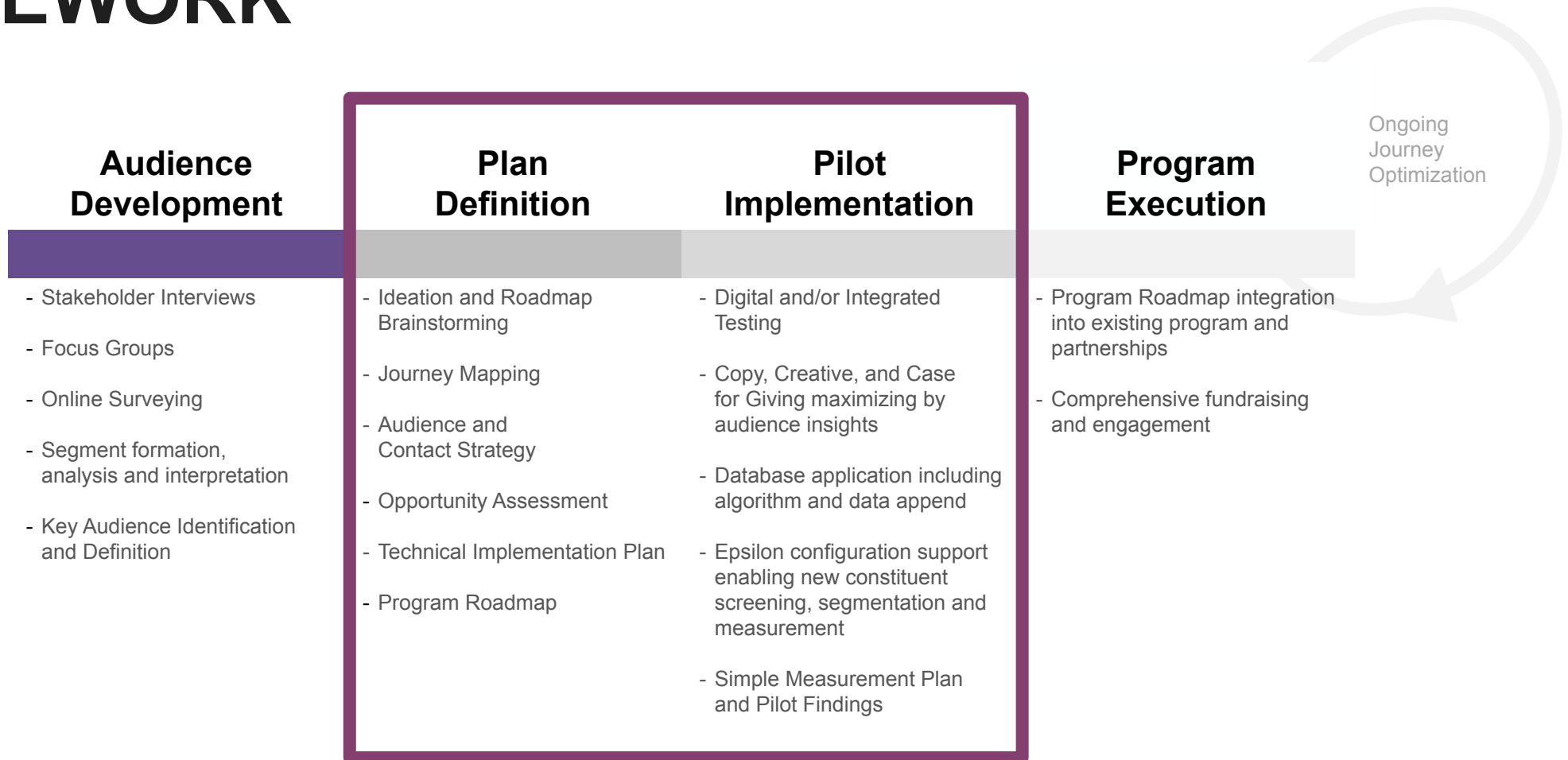
- GivingDNA Activation
- Messaging Pilot
- Chapter Engagement Pilot



*All data and client information is redacted

AUDIENCE ACTIVATION FRAMEWORK

With key audiences identified, AHS is poised to design and execute a pilot initiative that can demonstrate the value of focused engagement and stewardship on priority audiences.



PREDICTIVE MODEL

















APPLICATION IN GIVINGDNA

100+ variables analyzed across multiple sources to identify a model with segments that both had greatest impact on segment formation and are actionable for ongoing campaign purposes

Variables having impact on segment formation

1. Age
2. Amount donated to non-religious nonprofits past 12 months
3. Number of times donated to non-religious nonprofits past 12 months
4. Causes supported financially in the past 12 months
5. Donations to AHS
6. AHS support
7. Connection to AHS
8. Children <18 in household, employment status
9. Household income.

A final model will be simplified while generating accurate precision

Mid-level Prospects	All constituents, whose total giving was \$1,000 - \$9,995, who gave in any year between Jan 1 2019 - Dec 31 2020, who fall under the advanced criteria Giving Affinity in [Charitable], Net Worth in [\$2MM+, \$1MM-\$2MM]	287	Sep 12, 2020 09:38 PM	   
Philanthropic Non-Donors	All constituents, who are in the opportunity Non-Donors, who fall under the advanced criteria Giving Affinity in [Charitable]	36,973	Sep 12, 2020 09:38 PM	   
FY19/FYTD20 New Donors	First gift of all constituents, in any year between Jan 1 2019 - Dec 31 2020	4,858	Sep 12, 2020 09:38 PM	   
TM List	All constituents, who fall under the advanced criteria Number of Children in Household in [1, 2, 3, 4, 5, 6, 7, 8, 9], Net Worth in [\$1MM-\$2MM, \$2MM+],	14,185	Sep 12, 2020 09:38 PM	   



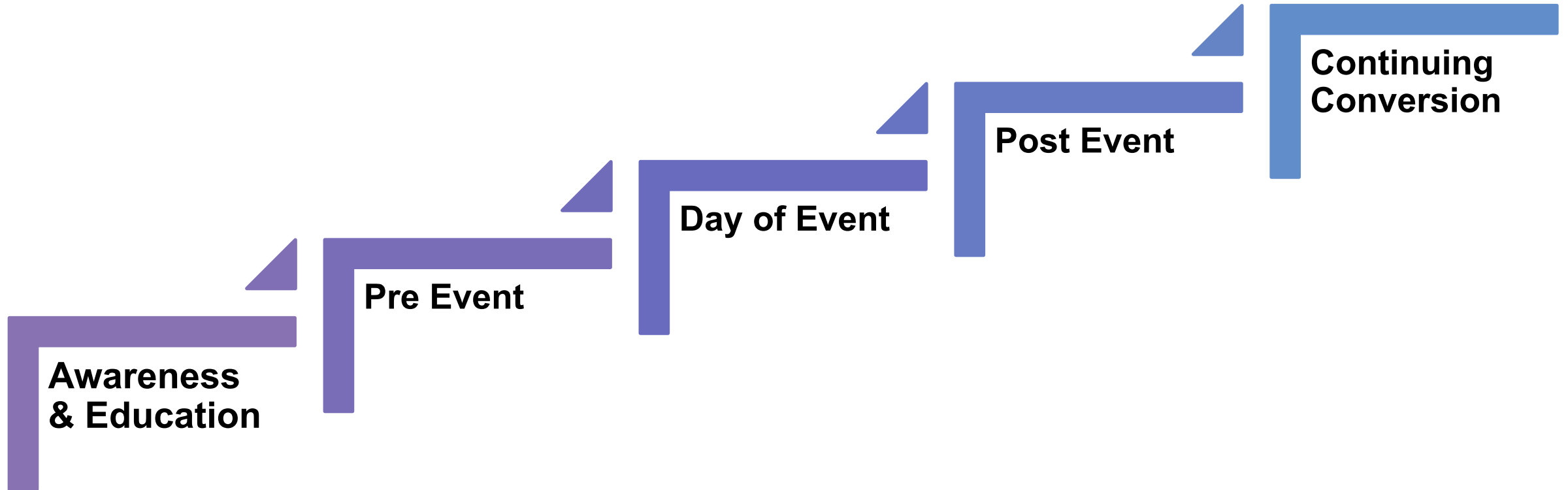
PERFORM JOURNEY MAPPING

DESIGN THE EXPERIENCE OF A SINGLE AUDIENCE SEGMENT

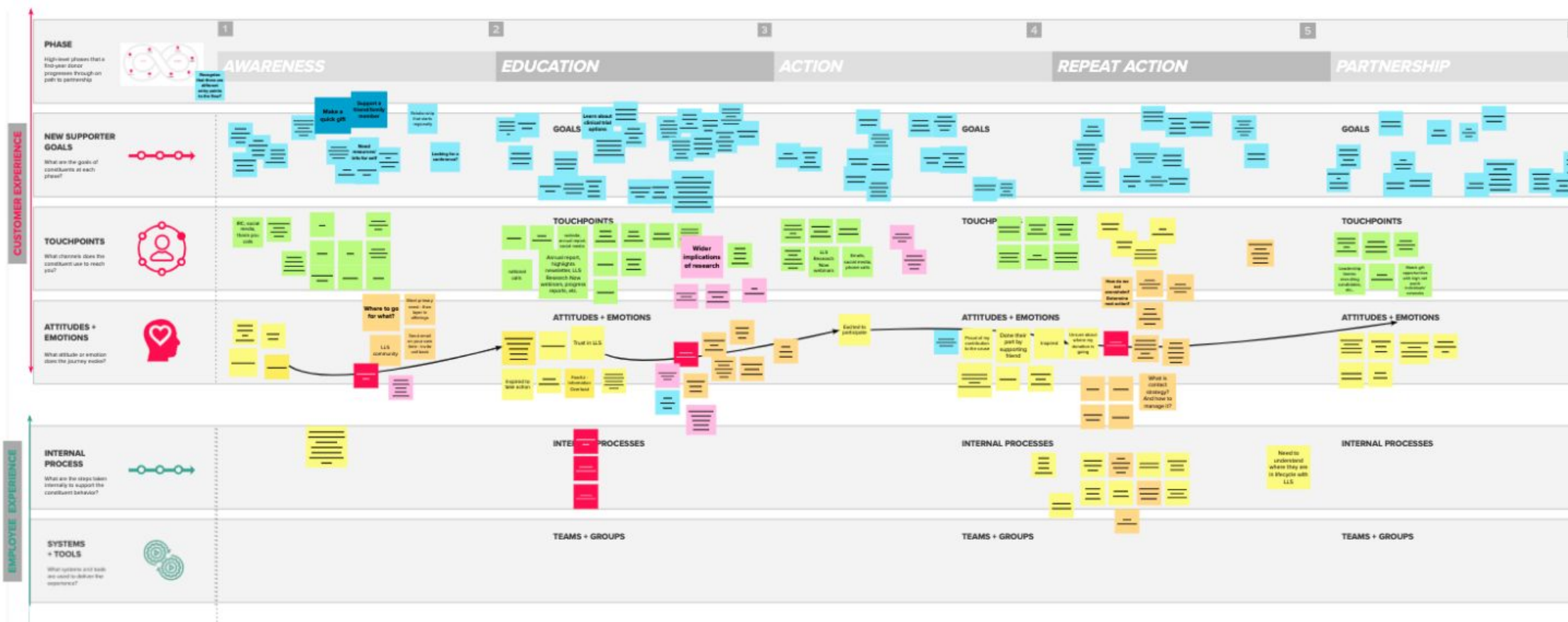


PERFORM JOURNEY MAPPING

DESIGN THE EXPERIENCE OF A SINGLE AUDIENCE SEGMENT

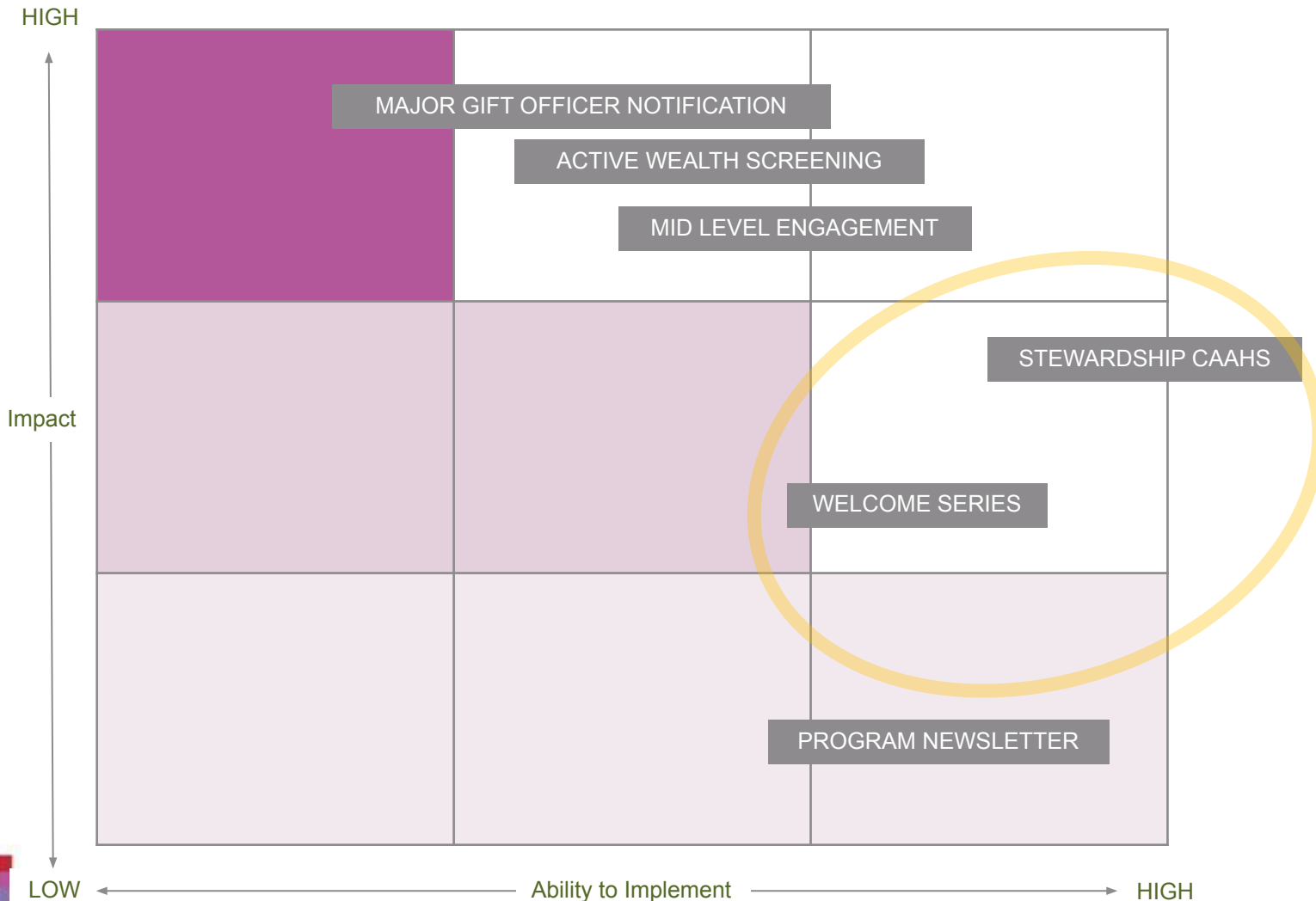


DONOR JOURNEY EXPERIENCE



VALUE DRIVERS

PRIORITIZING DONOR EXPERIENCE ENHANCEMENTS



- Specifying the impact of stewardship enhancements will help to identify and prioritize quick wins that demonstrate value and build program momentum.
- Requirements can be generated for quick win execution.

KEY RECOMMENDATION TACTICS

Retention and donor value can be influenced by audience segment through targeted stewardship and upgrade tactics.

- GivingDNA Activation
- Messaging Pilot
- Chapter Engagement Pilot

