

In response to your
Request for Proposals



You Take Care of Families,
We Take **Care of You.**

June 2023



A Proposal to Lead You Into the Future



Steven Busheé
President, TrueSense Marketing



Ethan Busheé
2023 High School Graduate

Dear Valued Ronald McDonald House Charities Chapter Partners,

I am so proud to be your partner, and of the work we've accomplished together. Many of you know that my drive to help Ronald McDonald House Charities Chapters is personal.

My son Ethan was born with a very rare disorder in 2003 and, though we lived close to the hospital, we witnessed first-hand how critical the Ronald McDonald House was for so many of the families in crisis with us who did not. I was determined to play a role in amplifying your mission in the form of fundraising, and, 15 years later, here we are.

After 60 years in business, TrueSense Marketing remains a privately owned company. As you have probably observed, that's something that is becoming increasingly rare in our industry.

Why does that matter?

Remaining independent of multi-national media conglomerates or private equity investors means we can be free to shape our business around your unique needs, and of all our clients, without being limited by shareholders focused only on the bottom line. That kind of freedom allowed us to create **Pay As You Grow** specifically for you many years ago, and more recently allowed us to throw out the rule book to do what it takes to maintain this revenue stream for you during and after a global pandemic when plans had to be rewritten and materials were scarce. "Act as if it's ours" is one of our core strategic anchors, and we honor that in managing our clients' programs and guiding our teams' decisions.

We are excited about your fundraising future and, just as we have every year, we will lead you into it.

A handwritten signature in blue ink that reads "Steven Busheé". The signature is fluid and cursive, with a large initial "S".



Table of Contents

05

Agency Information

14

Service & Operations

21

Data & Analytics

28

RMHC Direct Mail Case Study

37

The Future

49

Case Studies, Cont.

6 Reasons Why TrueSense Continues to Be the Right Partner for Ronald McDonald House Charities Chapters Right Now

1 Proven Results and Relationship.

You know and trust us as a partner. Some agencies routinely project dramatic revenue growth in the sales phase that they simply can't deliver if they win the client. TrueSense has been delivering on promises for you for all these years and remains a privately owned company, not beholden to shareholder expectations on earnings.

2 Advancement, Not a Re-Start.

With proven creative and media controls based on 15 years of aggregated historical data on strategies, segmentation, list analysis, tactics, and test performance, we offer you business continuity and no interruption in the advancements that are working now and the ones quickly coming next.

3 Build-to-Suit Digital.

Many Chapters want to take advantage of all the online giving opportunities that their national nonprofit peers have but they aren't equipped with the required expertise, staff, and tools. Because each Chapter owns and manages its own website where all online leads and donors will be directed, digital fundraising has to be a collaborative effort between you and your agency, different from one Chapter to the next. Driving you forward in digital growth will take the same creativity, listening, and process-shaping that your direct mail start-up did. TrueSense is best for the job!

4 Donor Segmentation.

We have the most effective donor segmentation model in the industry. The proprietary model (GPS) we developed and began applying to your donor file in 2022 has already proven to cut your costs and raise ROI (a great example is later in this proposal). The artificial intelligence expands with each gift file update so you spend less money appealing to donors who aren't likely to be responsive.

5 Reliable Production.

We produce direct mail in-house. That means we have greater control over materials and timelines when the rest of the industry struggles to get appeals out, and we can do it with less mark-up. Containing costs in print allows for greater return on investment.

6 The Value of Volume.

While we serve you as an individual client, the fact that we work with 63 other RMHC Chapters is a big advantage for you in leveraging critical mass in production; high-volume list media buys in print and digital; and robust testing simultaneously at small sample sizes that limit risk to you individually and speed up gains.



AGENCY INFORMATION

Who We Are: Agency Information

TrueSense is wholly owned by the Busheé family and headquartered just outside of Pittsburgh, PA. We are a full-service agency and production company with more than 60 years of history and a team of 452 employees who are passionate about fundraising and helping our clients accomplish their missions. We only work with nonprofits, and we plan, create, and deploy direct-response fundraising and donor-marketing programs across all channels. 100% of our work is on a fee-agreement/contract basis.

We are one cohesive team. We do not have standalone companies inside of a conglomerate with competing and individual goals. We are a fully integrated, unified, and collaborative team, with one mindset, which ensures our ability to provide exceptional service to our clients.

What We Do: Capabilities

- Strategic Planning & Budgeting
- Omni-Channel Integration: Direct Mail, Digital, Telephone, Broadcast, Outdoor
- Media Planning & Buying
- AI-Driven Targeting/Segmentation
- Proprietary Predictive Modeling
- Robust Reporting & Analytics
- Monthly Sustainer Program Strategy & Execution
- Original Donor Research
- Digital Advertising
- Creative Development: Design & Copy
- In-House Print Production of Direct Mail
- Donor Engagement Team (Phone Cultivation)
- Donor Database Administration
- Gift Processing Oversight
- Mid-Level Donor Program Strategy
- Pipeline Development for Major & Planned Gifts

The Strategic Anchors of TrueSense Marketing

01

We play the long game.

We are focused on long-term relationships, rewards, and results. We'll invest work and resources into that, even at the expense of our own short-term profit.

02

We act as if it's ours.

We recommend, care, implement, achieve goals, budget, manage, spend, etc., as if we were you, spending your resources responsibly and stewarding your constituents' interests ethically.

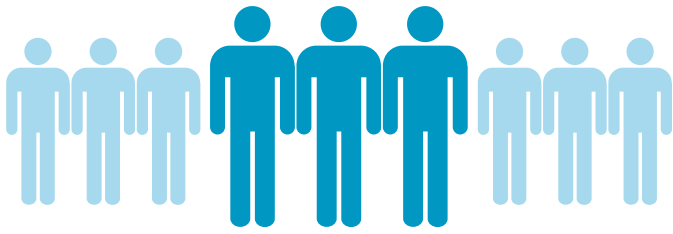
03

We innovate and scale.

In all our endeavors, we seek and invest in the most effective fundraising strategies, data science, and creative solutions so that, once fully operational, they can be leveraged cost-effectively for mission-critical organizations like Ronald McDonald House Charities Chapters.



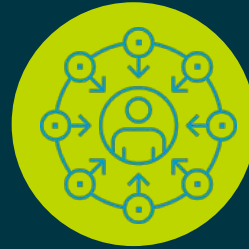
TrueSense Unique Advantages



Giving Potential Scores

(GPS)

Our powerful AI segmentation engine identifies the right donors at the right time and **improves ROI up to 30% compared to other methods based only on a few factors like recency and size of past gifts.**



Market & Donor Research

Our in-house team conducts branding and creative research to understand your brand's competitive differentiators and identify the best positioning for acquisition and cultivation.

Donor Database Administration

For RMHCs, our management of your direct mail donor database and your gift processing company removes the burden of gift entry, file maintenance, and time-intensive data file pulls from your staff.

It's an optional service almost every Chapter takes advantage of.

Pay As You Grow

We developed a cost-deferred payment plan specially for RMHC Chapters to make a start-up direct response fundraising program accessible for all Chapters — without requiring any up-front investment at all.



Donor Engagement Team

(DET)

In-house fundraising professionals who engage your high-value donors by phone to **strengthen donor retention and revenue.**



In-House Production

Unparalleled direct mail print and production with state-of-the-art equipment leveraging data personalization and delivering cost efficiencies, **all under our roof.**

Who we serve

Our sole focus is supporting nonprofit organizations across a number of sectors, including social services, international relief, health care, veterans services, and others. All of our work is on an annual contract basis. The organizations below represent a portion of our client portfolio which includes national, international, and regional nonprofits.



Clients Gained / Lost in Past 12 Months

Gained:

- Braille Institute of America, Inc.
- Baylor College of Medicine
- Georgetown University
- Allina Health Foundation
- The Nemours Foundation
- RMHC of Norfolk
- Southern Appalachian RMHC
- RMH Houston
- RMHCTampa Bay
- Food Bank of Central New York
- Ozarks Food Harvest
- Southeast Texas Food Bank, Inc.
- Foodbank of Southeastern Virginia
- Care and Share, Inc.
- Food Bank of North Central Arkansas
- Sacramento Food Bank
- Animal Care: Humane Society of Fairfax County, Friends of the Shelter, Neighborhood Cats, SPCA of Monterey County, Woodford Humane Society, Woods Humane Society, Sequoia Humane Society, Tompkins County SPCA, Benton-Franklin Humane Society, New Hampshire SPCA, Idaho Humane Society, Alley Cat Advocates, Maui Humane Society, Operation Catnip of Gainesville, Spokane Humane Society, The Humane Society of Boulder Valley, Vanderburgh County Humane Society, Yavapai Humane Society, Oklahoma Humane Society, Valley Humane Society, Mohawk and Hudson River Humane Society, SPCA of Westchester, Animal Welfare Association, Olympic Peninsula Humane Society, Humane Animal Rescue of Pittsburgh, Arizona Humane Society, SPCA Cincinnati
- Rescue Missions: Las Vegas Rescue Mission, Waterfront Rescue Mission, Home Sweet Home Ministries, Twin City Mission, Grace Centers of Hope, Chattanooga Rescue Mission, Christian Herald, The Bowery Mission, Hope Haven Gospel Mission

Lost:

- Dana-Farber Cancer Institute
- Mayo Clinic
- RMHC of New England, Inc.
- RMHCTulsa
- RMHC Arkansas
- RMHC Northwest Florida
- Akron-Canton Regional Foodbank
- Food Lifeline
- The Houston Food Bank
- Haven of Rest Ministries
- Morning Star Mission Ministries
- Waterfront Rescue Mission
- Bethesda Lutheran Communities
- CARE

With TrueSense, fundraising is getting PERSONAL.

The future of fundraising is already happening here.



Technology
shouldn't replace
human connection.

**It should
enable it!**

As every Major Gift Officer knows, the more you get to know the donor, the more personal and meaningful your interactions become — and the greater the likelihood of receiving their gift and lasting loyalty. With TrueSense Marketing's continual investment in information systems and data science, we're making this kind of donor intelligence and personalized fundraising possible **for every donor.**

We're raising more net revenue for nonprofits by progressively turning the mass market of direct response fundraising into a micro one, where donors and prospects are moved by the content of mail, e-messages, digital ads, or phone calls that have been tailored to them. This takes fluidity that you can only get when all channels are actually executed *within* the agency.

Our artificial intelligence-driven marketing technology allows us to precisely select donors based on a myriad of criteria and then act on that intel by tailoring timing, channel, messaging, ask strategies, and more. Soon we'll be doing that in a trigger-based system where a letter, call, or email can be produced for a single donor.

Having the on-demand lettershop, callers, and digital specialists in-house means a highly controlled environment, and having that controlled environment means we can do things with our AI and data science that otherwise wouldn't be possible.

The graphic on the next page illustrates how all of our expertise and capabilities work together to maximize revenue and speak directly to individual donors.

Micro-Targeted Marketing

We have the INTEL and EXPERT STAFF who create the plan ...



**AI-FUELED DONOR
TARGETING PRECISION**



**MULTICHANNEL STRATEGISTS
FOR EVERY CLIENT**

... and the control that comes with having ALL THIS IN-HOUSE ...



**PRINT & MAIL
PRODUCTION**



**DONOR ENGAGEMENT
PHONE TEAM**



**DIGITAL MEDIA
EXPERTS**

... which means WE CAN DO THIS!

PLAN
A



DONOR A

PLAN
B



DONOR B

PLAN
C



DONOR C

PLAN
D



DONOR D

PLAN
E



DONOR E

PLAN
F



DONOR F

PLAN
G



DONOR G

Personalized, Automated Donor Experiences, Timing and Channels = MAXIMUM REVENUE



Innovating Our Industry, From Within and Without

A truly innovative operating model.

We have developed a single, proprietary *Agency Operating System* to integrate every aspect of your program, from concept to deployment, in every channel. This silo-free operational environment sets the bar for efficiency and capacity. It is unlike any in the industry and is the singular “background” innovation that enables today’s sophisticated technology to power your program into the future.

Leadership in the industry. We believe our clients, including you, are best served by an agency that leads not only by practice but also by staying ahead of industry trends and innovations to inform our counsel to you. That would be impossible without the involvement of our knowledge leaders in enterprise and governance activity within the industry itself. As board members, conference chairs, steering committee members, speakers, and activists, they are embedded in a variety of leadership and voluntary positions with the primary industry organizations, including The Nonprofit Alliance (TNPA), Direct Marketing Association of Washington (DMAW), the annual Bridge Conference, Association of National Advertisers (ANA), NTEN, DMFA, and a variety of sector-specific organizations.

Most recently, TrueSense team members have filled the roles of Bridge Conference Co-chair, TNPA Executive Leadership Lab steering committee members, multiple conference session presenters, and activists lobbying for preemptive Federal privacy legislation and the Universal Charitable Tax deduction. The insights and advice gleaned from these experiences are passed directly to our client teams for the benefit of you and other clients.



SERVICE & OPERATIONS

We are proud to be your powerful, behind-the-scenes, under-one-roof support team. We've shaped an entire unit of business operations specifically around RMHC Chapters' needs so that less of your time goes to this growing revenue stream and more can go to your other mission-critical work. And we're not just focused on the "now." With the power of our innovation, from data science to print technology, we are constantly navigating you forward to **what's next**.

The full scope of our service to you:

1

Strategy

- Develop data-driven annual plan, budget, and projections
- Develop campaign creative controls and tests using resource we gathered
- Submit all appeals to RMHC Global for approval

2

Data

- Scientifically select donors and prospects by appeal
- Pull donor data files for all mailings
- Include Chapters' housefile donors in appeals by request

3

Production

- Produce direct mail in-house
- Develop and deploy emails and donation forms using our custom digital platform

Manage your Google Grants to drive web traffic to you

6

Analysis

- Monitor and report on results
- Analyze donor files at macro and micro levels

4

Donations

- Manage your third-party gift processing company
- Enter donations into the donor database we maintain on your behalf

5

Cultivation

- Send timely acknowledgments
- Make stewardship phone calls by in-house Donor Engagement Team

Collaborate with the RMHC Chapter Advisory Group

A graphic illustration featuring a map of the United States. The map is composed of a dense field of small, red hearts. In the bottom-left corner, there is a dark blue circular inset containing a magnifying glass with a white handle. The lens of the magnifying glass is focused on a single, slightly larger red heart, symbolizing a detailed look at a specific data point or a focus on a particular aspect of the overall data represented by the map.

- Reports needed for board meetings; individual Chapter custom needs; ongoing resource-gathering

An opportunity for a panel of Chapters who are open to testing new and innovative fundraising initiatives to self-identify and join the pilot program. This panel will allow both RMHCs and TSM to gather quick learnings and have a solid foundation of data to expand services to all Chapters. It speeds up innovation and meets Chapters where they are.

Your Team



Katie Coradi

Vice President & Managing Director

Katie is responsible for the overall success of this fundraising program for RMHCs. She leads the client service team and is the connector of process, strategy, personnel, performance, and technology related to your program. With nearly a decade at TSM, Katie has held many roles, with half of her career working hand-in-hand with RMHCs. **She is your primary agency contact.**

FAVORITE PART OF WORKING WITH RMHCS:

Seeing the drive and commitment of RMHC Staff. My cup always feels full after visiting a House or speaking with those on the front lines of your mission!



Lorraine Stewart

Account Director

Lorraine works to develop her clients' annual multichannel marketing strategy, annual budget, and revenue goals. She enjoys developing strong relationships with her clients, ensuring you feel supported and listened to. Lorraine has over a decade of working with Chapter-based nonprofits and directly partners with Will to lead a portion of Chapters.

I have a new appreciation for everything you do for families after experiencing a 30-day NICU stay with my son this past year. It put the care you provide into perspective for me.



Will Eriman

Account Director

Will has over 25 years of advertising experience, nine of those years working hand-in-hand with nonprofit clientele such as Rescue Missions and Food Banks. He is dedicated to a portion of RMHC Chapters, developing strategy and tracking to budgeted goals, alongside Lorraine.

Looking at your long-term growth and partnering alongside you to continue expanding on your mission!



Kelly Pullin

Strategy Director

Kelly has worked in direct response marketing for nearly all of her working life, and in fundraising for over 16 years. Her experience across many areas, including media planning and buying, analytics, marketing insights, and account management, could not be more perfect for her strategist role here at TrueSense.

These families could be any of us. I love that RMHCs ease the burden on families when they are facing such stressful circumstances. And with such consideration and care!



Dee Crawford

Senior Account Manager

Dee is dedicated to maintaining client satisfaction. She has over 30 years of direct mail production/lettershop experience. These unique capabilities make her a perfect fit for her Senior Account Manager role. Dee co-manages execution of all aspects of our annual direct response fundraising plans for our Ronald McDonald House Charities clients.

Seeing the passion and dedication of many individuals pulling together to help children and their families!



Alora Valadez

Account Manager

Alora has over 10 years of Donor Engagement and Project Management experience at TrueSense. Her past roles have given her the tools to effortlessly step into her role as Account Manager. She continues to serve Ronald McDonald House Chapter clients and works with Dee to manage the many details of our clients' fundraising programs.

I enjoy collaborating closely with RMHCs to produce meaningful fundraising appeals. The work you do is simply amazing!



Angie MacAlpine

Vice President, Creative Director

Angie has been using her creativity to help nonprofits make the world a better place for the past 14 years. She's produced award-winning — and most important — effective multichannel fundraising campaigns for national and local organizations across all sectors and channels, and she has been your TrueSense Creative Director for the past four years.

I've had the honor of sitting with some of the families you help. The level of support, love, and kindness you give to families in their most difficult days is incredible. Thanks for letting us be a part of your mission!



Marcy Auman

Executive Vice President

During her 16 years with TrueSense Marketing, Marcy has been part of major turnaround stories. Under her leadership, new direct response programs have been born; revenue lines righted; and agency professionals grown. Marcy leads our teams who own the strategic, long-term growth of clients' donor revenue. She's passionate about fostering the strongest relationships and zealous when it comes to getting things done.

I love the celebration that goes on at TSM when a nice BIG gift comes in for a Chapter. The news spreads like wildfire through our team, with happy dances and GIFs all around!



Katy Jordan

Senior Vice President, Digital Marketing

Katy is a digital and multichannel marketing professional with more than 15 years experience in nonprofit and agency settings. Katy has led fundraising program growth through digital transformation and integrated marketing for charities including Shriners, Disabled American Veterans, Boys & Girls Clubs of America, American Heart Association, and many more.

Every time I visit an RMHC house I'm inspired — by the families, the staff, the volunteers. The support, hope, and love are tangible and so needed for kids and families facing unimaginable circumstances.

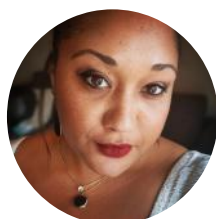


Taryn Myers

Vice President, Digital Media

Taryn started her marketing career at a local newspaper and, from there, expanded her experience to corporate media for a newspaper conglomerate with 350 print and digital platforms across major U.S. markets. As Vice President of Digital Media, Taryn works across all TrueSense clients to develop and optimize effective digital advertising campaigns to meet and exceed program goals.

I experienced the care of RMHCs, when both my niece and nephew had extended hospital stays in the NICU, and my siblings used RMH to stay close to their children. RMHCs will always have a special place in my heart for the care they provided to my family.



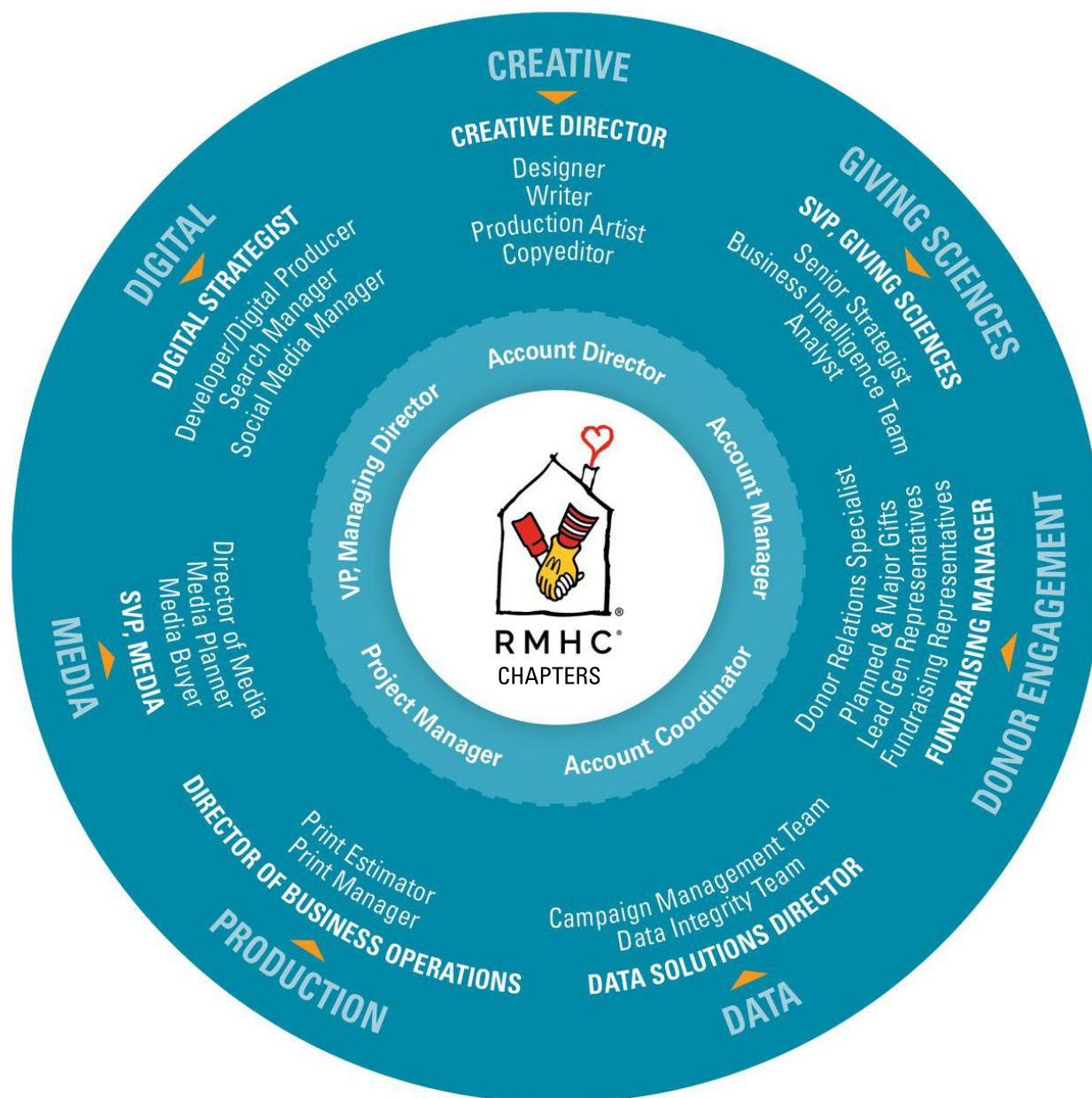
Brianca Climons

Senior Digital Strategist

As a Senior Digital Strategist, Brianca has years of experience across various verticals that has allowed her to develop insightful and experience-based strategies that elevate digital programs across her portfolio. Growing clients audiences, heightening audience engagement, and further defining donors according to analytic-based behaviors leads to better understanding of donor journeys across all fundraising efforts.

I really enjoy being able to help create resources needed to help heal children and their families. It's an honor to be able to guide the strategies that sustain and grow this legacy.

This diagram illustrates our TrueSense structure for serving you. Your dedicated Client Services team represents you within our agency, for all aspects and channels in your program. The Client Service team collaborates with surrounding subject matter experts to develop and deploy campaigns and to manage performance. Because of our complete in-house operations, processes are fully integrated inside the company and managed by a connected Operations team.



We have two "pods" of three client service people each (AD, AM, AC) dedicated to RMHC Chapters. Each pod of three serves approximately 30 individual Chapters.

The roles on your Client Service team in full are:

- 2 Account Directors**
- 2 Account Managers**
- 2 Account Coordinators**
- 1 Donor Database Administrator**

Benefits of Our In-House Direct Mail Production



Control over timelines
Greater access to materials
Creative problem-solving
Unusual formats
Max personalization
Cost containment
Fast pivots when needed



DATA & ANALYTICS

We see the strategic planning process as a circle with ever-present elements of analysis, listening, and accountability to results.

What differentiates our Data & Analytics from other agencies?

Of course, all strategy and analytics starts with data. But delivering on the promise of data-driven fundraising requires three key disciplines: **technology-enablement; academic and professional expertise in data sciences; and curiosity — allowing you to find the things that all others are missing.**

In short:

1 Our Data

2 Our Technology

3 Our People

1 DATA

Our extensive catalog of RMHC data informs your plan:

- Appeal performance data over **14 years** and **68 RMHC Chapters**
- Response data for more than **1.7 million gifts**
- Modeling based on data attributes of more than **1 million donors**
- Use/testing of more than **100 prospect lists/sources** over 65 acquisition campaigns

2 TECHNOLOGY

For success, an agency must create a data culture and practices that bring together data science and analytic talent as well as cutting-edge technology tools and weaves them into their decision-making so that data becomes the default support system for all operations. TrueSense Marketing embarked on this journey to revolutionize the way we deliver high-performing marketing campaigns back in 2016 — way ahead of our peers in considering, adopting, and ultimately implementing a cutting-edge unified data-analytics environment.

In 2019, TrueSense Marketing completed the build-out of our proprietary COMPASS™ donor intelligence platform on a channel-agnostic data model, securely hosted within a Snowflake environment. The COMPASS platform was then intentionally combined with Tableau visual analytics software to deliver heavily curated standard and ad hoc reporting at scale so that, from the smallest to largest clients we serve, everyone would benefit equally. Through this we've made data more accessible, thus increasing the speed at which we gain insights which inform everything from donor selects to campaign changes to test plans.

What differentiates our Data & Analytics from other agencies?

3 PEOPLE

While other agencies may acquire or even build similar technology infrastructure, without the talent of data teams with exceptional skills the inherent power of your data would never be realized. Because it is only with academic and professional expertise in data sciences, coupled with healthy curiosity, that your data can translate to meaningful benefits to your bottom line. That commitment to human expertise benefits you in three ways:

Your Technology and Data Solutions team

consists of over two dozen technologists, programmers, software developers, and IT compliance and infrastructure professionals, with experience across Fortune 1000 for-profits as well as decades of combined experience supporting the nonprofit clients we serve. This team works to ensure that the data each of you share with us:

- Is securely and accurately loaded to our data warehouse environment
- All the data pipelines that provision that data to our reports, tools, and frameworks are established and working
- Privacy, audience, and geographic safeguards are in place for campaign implementation

Your Giving Sciences team

is one of the largest in the nonprofit agency space with nearly 20 analysts, statisticians, primary researchers, and data visualization experts who provide concrete and actionable solutions to some of the most complex substantive challenges facing fundraisers today. Our Giving Science team:

- Provides industry-leading advanced and predictive analytic solutions, like **our AI-powered Giving Potential Scores (GPS)**
- Conducts primary market research, like our annual *DonorGraphics* national study measuring philanthropic attitudes and behaviors and shifting sentiments among U.S. and Canadian adults
- Closely partners with our Strategists to uncover the elusive insights hidden in donor/client data

Your Strategy Practice

is comprised of eight executive-level senior fundraising experts with diversified knowledge bases spanning data, CRM technology, analytics, and traditional and digital marketing channels, with decades of experience managing large national annual fund programs inclusive of acquisition, cultivation, stewardship, monthly giving, mid-level, major, and planned giving programs.

This team effectively acts as our **internal challenge network**, ensuring that the clients we serve not only find the right answers in pursuit of their goals, but ask the right questions to begin with.

What data analysis tools and techniques do you use to inform strategy development with your clients?

STRATEGY DEVELOPMENT

When we develop new or enhanced strategic concepts for RMHCs, we leverage a cross-functional multichannel approach that includes participants from our Client Service, Giving Sciences, Strategy, Digital, and Creative teams. That said, the underpinnings of all great strategies are rooted in rigorous data analysis, so there are some frameworks and tools we lean on to help establish a go/no-go decision on new strategies based on the need-state of each organization's donor file and the thresholds for financial success.

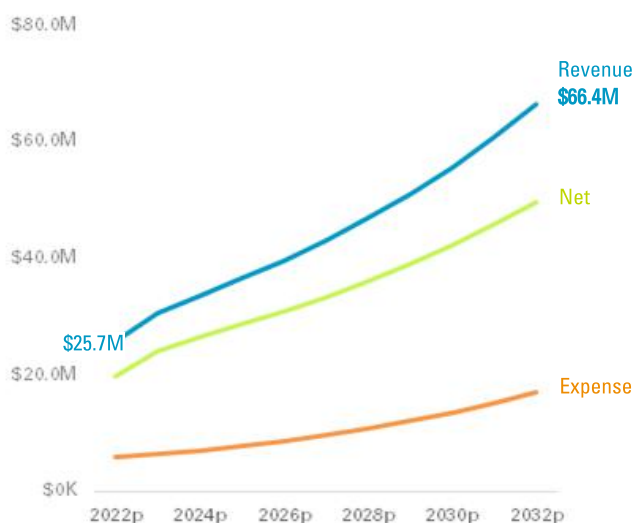
To evaluate the health and/or need-state of the organization's donor file, we use our suite of **Donor Health Index** tools. This six-lifecycle framework can **diagnose historical or** emerging performance trends across your donors' giving behaviors, and from that we can begin to focus our planning and thinking on **the appropriate metrics** to move.

Additionally, built upon the same six-lifecycle framework is our **TrueCast™** scenario engine. This proprietary framework allows TrueSense Marketing to create what-if scenarios reflective of countless considerations from investment decisions, media mix alterations, **environmental circumstances, or other program** modifications, and accurately projects both near-term and long-term results on your program (file size, value, long-term net, etc). When realistic inputs are fed into this framework it allows Ronald McDonald House Charities Chapter leaders to see the likely upside and trade-offs of decisions before ever actually having to make them. This advanced level of scenario forecasting is far more accurate, trustworthy, and data-rooted than any other projection methodology in our space.

Casting a vision based on being able to see the results of a big "what if?"

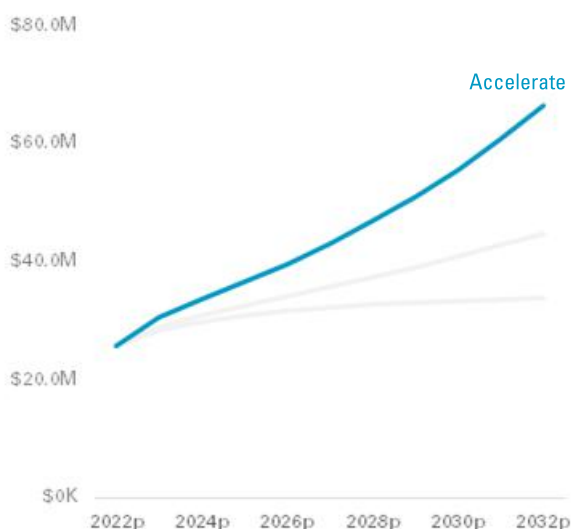
FINANCIAL VIEW

An accounting view of this scenario



COMPARISON VIEW

How does this plan compare to the alternates?



What data analysis tools and techniques do you use to inform strategy development with your clients? (continued)

PREDICTIVE MODELING

Modeling is an integral part of strategy development for our clients. TrueSense has been modeling in the fundraising space for over a decade. Predictive modeling combines demographic, psychographic, and behavioral data at the individual level to predict future performance. **We build models for cultivation, acquisition, lapsed reactivation, planned giving, and sustainer conversion (to name a few).** Our approach combines response and revenue models to ensure one is not maximized at the expense of the other. Our proprietary modeling is called **Giving Potential Scores or GPS.**



With GPS modeling, we enhance your donor data with demographic data and continually refreshed data on donors' giving and digital engagement to move beyond one-size-fits-all transactional approaches and, instead, scientifically match the right message and channel with the right donor/prospect at the right time.

In terms of performance, our models have never been beat in controlled, head-to-head tests with other modeling providers.

- **4–8% increase** in net revenue when compared with RFM or other segmentation.
- **65% increase** in sustainer conversion over the control group.
- **54% increase** in annualized donor value for sustainers over the control group.

Your Success Using TrueSense Giving Potential Score (GPS) for Segmentation

We are excited about the immense impact GPS is having for you! GPS uses artificial intelligence and machine-learning techniques — the same as those employed by commercial and medical industries — to deliver cutting-edge donor segmentation customized to each individual on your file. We are the first marketing agency to bring an algorithm this powerful to the nonprofit sector.

Our use of GPS for RMHCs over the past three years has cut the percentage of non-responsive donors in mail appeals down from 18% (when using traditional RFM selects like other agencies) to just 4%! This lower-performing audience- who would generate negative net revenue- is identified through the data intelligence of GPS. Limiting the audience has improved net revenue by reducing costs while retaining gross revenue.



In the example above, rather than selecting all donors in a particular recency and value segment for inclusion in an appeal, GPS surgically selects only certain donors from each segment based on each individual donor's score, which is based on 100+ attributes (age, net worth, life stage, donor season trends, just to name a few). The simplicity of the resulting score is what makes GPS work.



INDIVIDUALIZED

GPS evaluates and scores each donor WEEKLY based on their individual giving behaviors.



MULTI-FACTOR

GPS considers a broad range of factors that reveal which donors should or should not be targeted.



FORWARD-LOOKING

GPS consumes your donors' behavioral data to fuel an AI-powered decision engine that predicts likely future performance.



DIRECT MAIL CASE STUDY: RMHC CHAPTERS



Building a direct response fundraising program from the ground up

When we first began working with Ronald McDonald House Charities Chapters, there were only a couple who had a direct response donor development program in place. While many nonprofits with mature direct mail programs raise the bulk of their donor income that way, for RMHC Chapters it had been a missing piece.

Lack of marketing budget had prevented many chapters from getting started, but there was also the challenge of ROI. As an individual local charity, the costs for renting prospect lists and creating, printing, and producing direct mail appeals would simply be too high for the Chapter to recoup from donor gifts within a reasonable amount of time.



Ronald McDonald
House Charities®
CHAPTERS

A program that
allows RMHC
Chapters to leverage
the combined volume
of many to keep
costs low for each.

In 2007, RMHC Chapters began coming together in a cooperative, direct response donor development program with TrueSense that has grown to include 63 RMHC clients who have raised as much as \$15 million annually. With this critical mass, we have evolved and expanded scope of service and strategy to include the same type of sophisticated, targeted, segmented direct mail strategies that the largest national nonprofits employ. We've integrated email and social marketing with the mail campaigns to bolster direct mail results, and we've scaled Google Grant management in a way that drives web traffic for individual Chapters' local site content. The evolution continues today as Chapters will have the chance to choose from digital fundraising service tiers to begin building digital-first donor files.

The cost-deferred payment plan we developed for RMHCs is called **Pay As You Grow**. With it, we mail a Chapter's new donor acquisition and subsequent donor cultivation mailings with no upfront cost to them. As donations from the donors begin to flow in from the appeals, they pay us only the amount they receive each month until their costs are "paid off" and they can afford to pay on their own. While the investment was a big one for TrueSense, it was one that we knew was a good one.

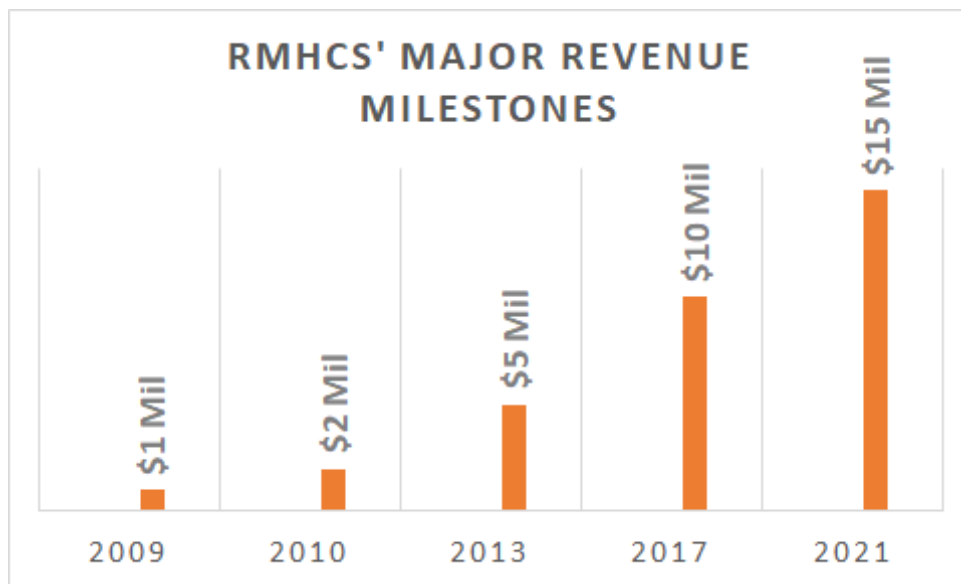
In order for this start-up program to be viable for RMHCs who often run with lean staff, it had to be all-inclusive in terms of operations.

Everything from prospect list sources to creative themes and messaging had to be originated and continually tested here at TrueSense. Big breakthroughs all stacked on top of each other to result in a program that was at or above industry benchmarks in just a matter of a few years.



Measuring Success

Growth in Numbers



Of the 700,000+ new donors across all Chapters, those donors with 5 or more years of consecutive giving have generated over **\$60 million** since 2007!

Positive Metrics Compared to Benchmarks

| INDUSTRY COMPARISON | OVERALL | HEALTH | RMHCs | versus OVERALL | versus HEALTH |
|-----------------------------|---------|--------|-------|----------------|---------------|
| Revenue per Donor | \$130 | \$71 | \$80 | -\$50.38 | \$8.62 |
| Average Gift | \$45 | \$38 | \$51 | \$5.60 | \$12.60 |
| Gifts per Donor | 2.43 | 1.59 | 1.57 | -0.86 | -0.02 |
| 2nd Year from New Retention | 28% | 27% | 33% | +5.4% | +6.4% |
| Multi Year Retention | 61% | 58% | 64% | +2.5% | +5.5% |
| 1-5 Year Reactivation | 9% | 7% | 9% | -0.1% | 0.02 |

Source: donorCentrics Index, 2021 and 2020

Demonstration of Partnership

TrueSense put “skin in the game” — investing right alongside RMHCs

Sixty of our current 63 RMHC Chapter clients started their direct mail fundraising program with TrueSense, using our cost-deferred payment terms (Pay As You Grow). This meant that instead of paying full cost with each campaign, they could pay in increments equal to their donation revenue until their program was net profitable. Through PAYG, these Chapters never had to use development budget dollars or experience a net loss. **Only 12 Chapters are in PAYG today, and nearly all of them just began in the last two years.**

Proactive Leadership

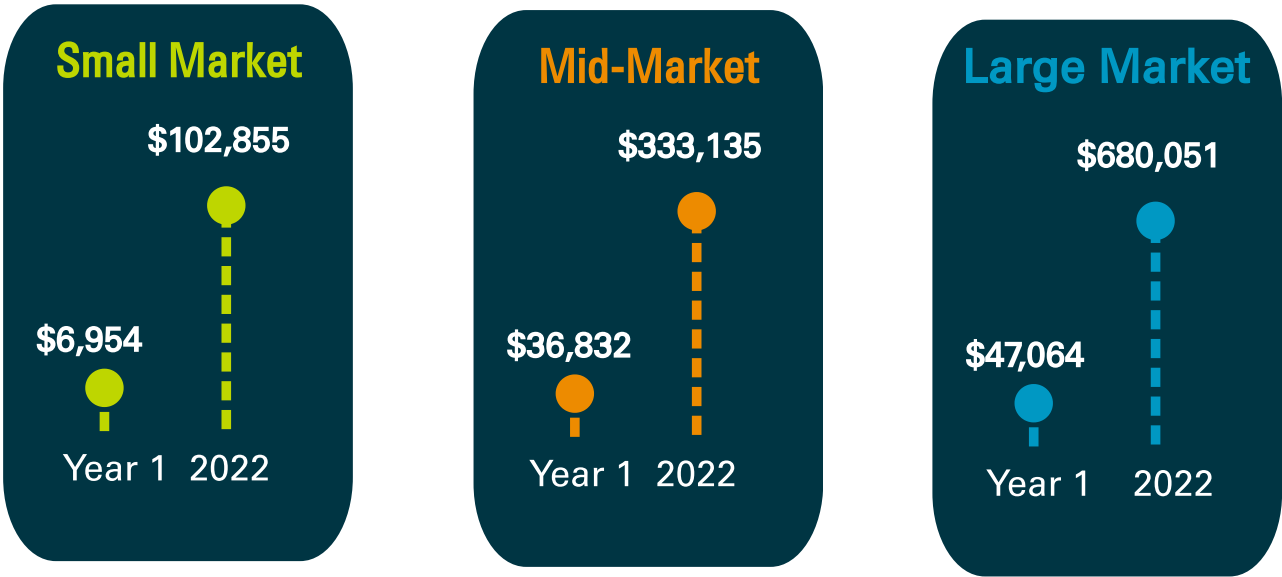
When the pandemic hit, TrueSense launched into action to review and revise all client plans according to the rapidly changing circumstances going on at RMHC organizations and in homes of donors all across America. In some cases that meant we absorbed costs of already-produced materials and cancelled rental lists. Far into the pandemic it also meant early purchasing of materials and redesign of package formats so that we could get your appeals produced without interruption to this revenue stream, which had become more important than ever for you.

Scalability of Services

The strategy, operations, and costs of this fundraising program have brought success for Chapters of all sizes.

You are all unique organizations within the RMHC Chapter system, with your own goals, budgets, priorities, and preferences. The strategy and service model that we built internally at TSM had to be flexible to meet the needs of all.

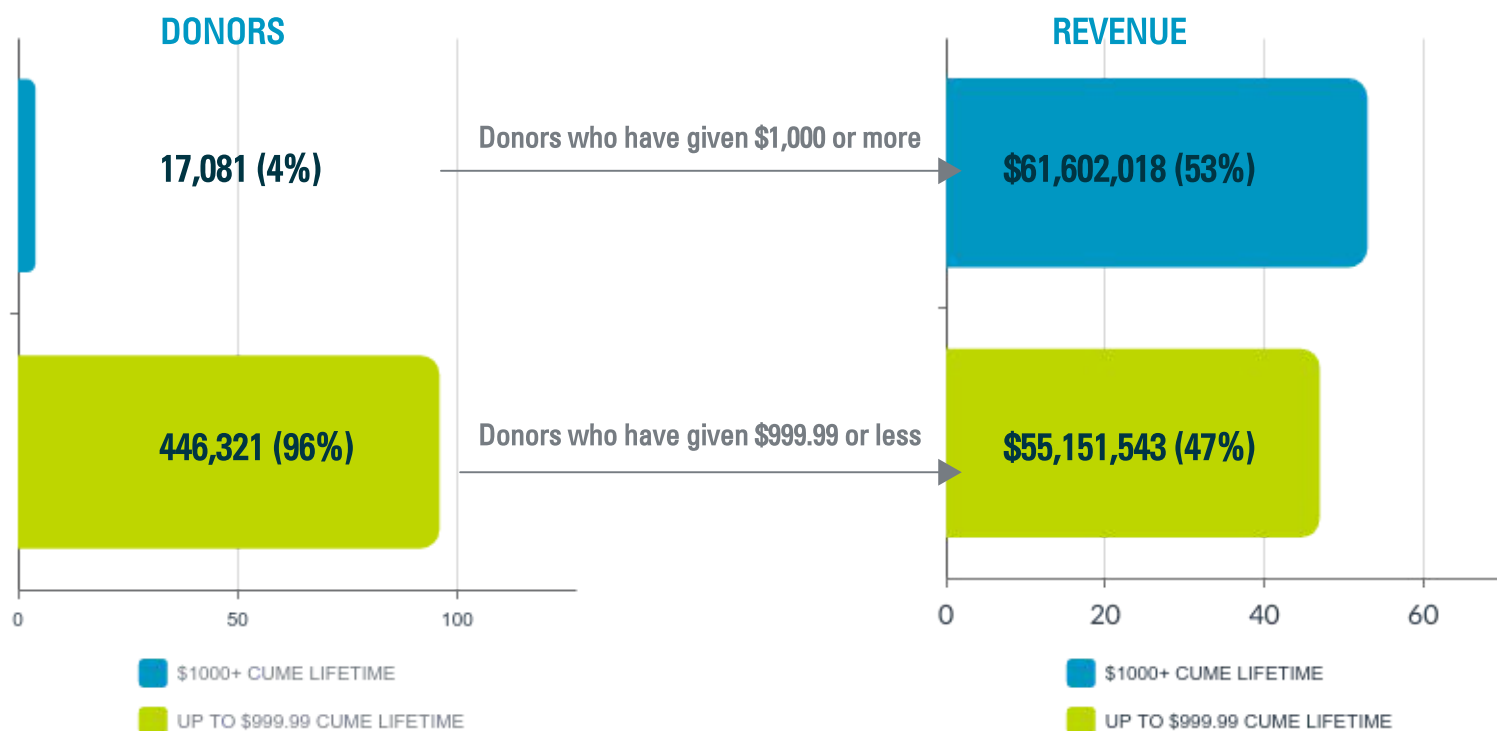
Revenue Growth From Starting Year



Growing Donor Value

There are 17,081 donors who have reached the milestone of \$1,000 or more in lifetime giving to a Chapter. Another 24,046 donors have lifetime giving in the \$500–\$999.99 range.

While donors with \$1,000+ in giving only represent 4% of the total donor file, they have given a whopping 53% of total revenue to date!



In addition to this success with retention and upgrading of Chapters' donors, there are the Major and Planned gifts that are received across Chapters. We love those calls from CEOs when they let us know about a big gift and are amazed to see direct mail as the only past communication history!

A small sampling of some of those notable gifts:

- \$45,000 Planned Gift last week
- \$50,000 Major Gift last year
- \$192,000 Planned Gift in 2020
- \$1 million Planned Gift in 2022

Growing Donor Value

Recurring Donors

Listening to donor preferences has been a cornerstone of our approach to growth for our clients. Early in our relationship with you, we developed the **Caring and Comforting Hearts (CCH)** program to provide your donors with a way to give recurring gifts at the frequency they prefer. Each year, we apply a model to your direct mail donor files and invite select donors to commit to a recurring giving schedule by becoming a part of Caring and Comforting Hearts. When they do, we omit them from mailings except newsletters and one key appeal a year, and instead mail them reminders according to their commitment schedule. This has led to great loyalty and increased value.

In 2022 alone, your 5,765 Caring and Comforting Hearts donors gave over \$875,000 to RMHC Chapters.

Increased Donor Value

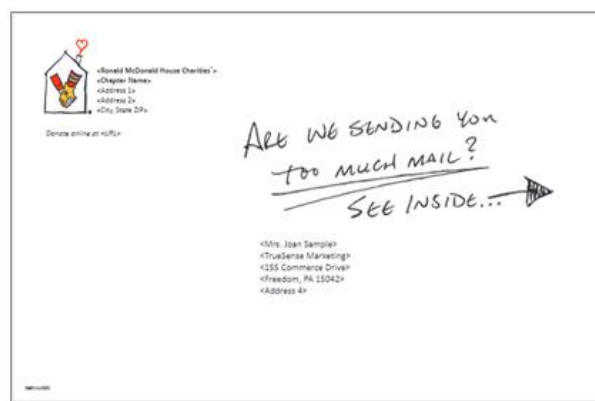
Caring and Comforting Hearts donors give, on average, twice as much as other donors in any given year.

Caring and Comforting Hearts Donors

\$151

Others

\$77



As of 2022, donors in the CCH program have provided over \$5 MILLION in ALL TIME revenue!

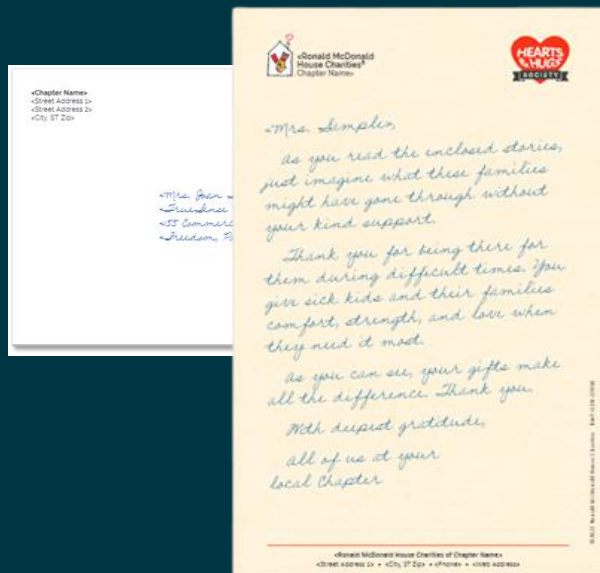
These 5,765 donors have given 115,000 gifts in their lifetime to date!

Continual Advancement of Strategy

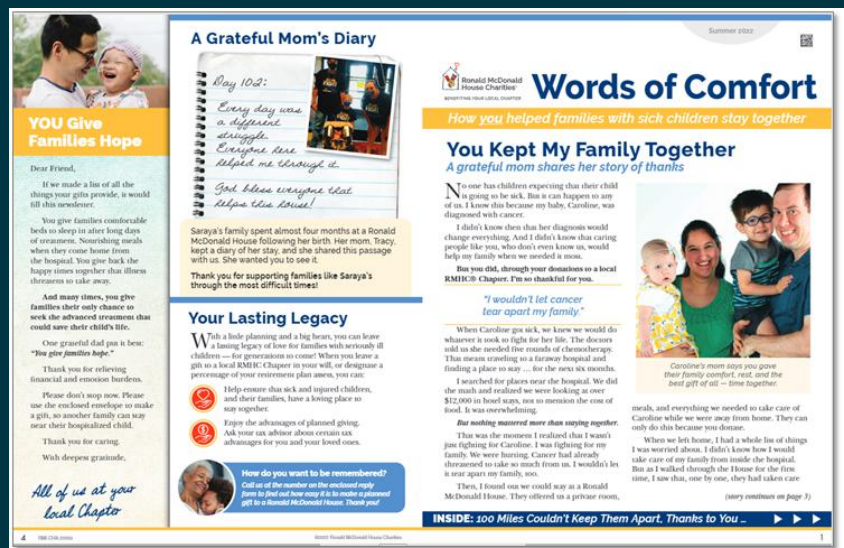
What started as two annual acquisition campaigns and a handful of cultivation appeals has fully evolved as Chapters' donor files have grown — to a robust strategic direct response program.

- Year-round new donor acquisition
- Newsletters
- High-Value donor society
- Donor Choice recurring giving club
- Lapsed and high value donor versioning
- Coordinated e-appeals
- Google Grant management
- Donor appreciation & reactivation calls
- AI-modeling
- House file donor inclusion offered

HIGH-VALUE DONOR SPECIAL TOUCH



NEWSLETTER



MATCH APPEAL

E-APPEAL



DONATION FORM

Continual Advancement of Strategy (cont'd)

A Digital Foundation for Success

Over the past seven years, we have partnered with 55 RMHC Chapters to amplify their direct mail efforts with digital "surround sound." In order for us to execute the emails on your behalf, we invested in a digital platform that allowed for individual Chapter emails to be produced with each distinctly different Chapter name, and to include links to online donation forms custom to each Chapter.



In digital partnership, RMHC and TrueSense have...

- Acquired new digital donors who are 62% more valuable than single-channel donors.
- Improved the Google Ad Grant program across 50+ participating chapters, increasing overall clicks by 31%, increasing overall click-through rate (CTR) by 11%, increasing conversions by 25%, and decreasing the cost-per-click by 1.4%.
- Leveraged personalized, email automation capabilities by deploying:
 - Re-activation strategy: "Donor-versary" automated email sent to donors one year after their first gift, resulting in a 0.1% response rate (233% better than typical RMHC Chapter email response)
 - Re-capture strategy: Next-day, automated email sent to potential donors who had clicked on an email but not donated the previous day, resulting in a 2.1% response rate
- Established and grew the digital monthly donor program, with 16% of monthly donors coming from a point-of-transaction upsell lightbox asking for monthly gift conversion.

And we are just getting started!



THE FUTURE

What we have planned for you for in the coming year and beyond:

1. Digital Fundraising — Chapter Choice Packages
2. More Monthly Donors
3. Advancing Acquisition with Media & Data
4. FastTrack Gift Processing and Acknowledgments
5. Donor Retention with Print Localization
6. Creative Evaluation Pre-testing

The Role Digital Plays in Giving

1

Donors and prospects spend a lot of time online.



2

They are shopping, researching, Facebooking, watching videos, and streaming shows.



3

Each activity generates new channel-specific data.

4

Smart marketers — including nonprofits — use that data to place ads where donors are spending their time.



RMHC's next big opportunity is to meet your donors where they are!

1. Digital Fundraising Chapter Choice Packages

Online adoption skyrocketed during COVID. Everyone turned to digital methods to do things they had previously done another way — like learning, socializing, meeting, shopping, and donating — and Boomers & Mature generations were no exception. As a result, nonprofits have wisely increased their focus and investments in online fundraising.

We've heard from many Chapters that they want to explore what's possible in building a digital revenue stream — and what financial resources it would take. Because you are individual organizations with geographical boundaries and individual websites and technology platforms, there can't be a single take-it-or-leave-it path forward. You need variations of paths that meet you where you are. In order to develop that set of digital fundraising solutions for where to take you, we have to first assess where you are.

TrueSense is currently in the midst of an RMHC Chapter-wide survey and audit to assess Chapters' current digital presence, planned expansion, and investment.

- In our Digital Presence Audits for all 55 Chapters we're assessing current publicly available digital properties (website, social presence, donation form experience) as well as survey responses, and identifying any immediate actions of optimization that can be easily implemented.
- We're also doing Expanded Audits for Chapters who have asked us about more digital activation and Chapters who have large email files or market opportunities. These audits include a deeper dive into technology stacks, social media, and web analytics accounts.

These assessments will inform details in the digital program tiers offered and in the custom digital action plans for those Chapters who choose them. Expanded audits are happening in markets seen here.



We know you

Our knowledge of RMHC Chapters, combined with our creative thinking and the results of this assessment, uniquely position TrueSense at the forefront of agency partners to provide data-informed, go-forward action plans in line with RMHC Chapters' current state and digital appetites. These plans will allow us to best serve the specific needs of Chapters, assisting them in digital growth from where they are, as opposed to a one-size-fits-all approach.

In digital, you have to track more than just gifts

According to the current Chapter survey, 67% of RMHC Chapters don't know their annual digital revenue. It's not their fault! Managing a digital fundraising program requires donation measurement and donor behavior tracking, and that requires technological and digital expertise.

In direct mail, we know which donors give and to which appeal ... that's it. We don't know which ones opened the mail, left it on the table for a while, how much time they spent reading it, or whether they shared it with a friend. If we did, we could follow up with them accordingly. In digital fundraising, we can tell the equivalent of all those things (if proper website tracking and digital platforms are in place)! Having that data not only enables digital revenue and performance tracking, it actually also drives the tailored digital ads that are placed immediately following to those donors.

In order to acquire digital-first donors and all the additional revenue they bring, it will be crucial for Chapters to have a technology stack in place that delivers and measures your digital ads/appeals. **TrueSense is offering a robust toolkit and web analytics solution to help RMHC Chapters.**

What Does Digital Success Look Like?

A new donor acquisition revenue stream



Big increase in brand awareness



Growth of your e-file, which unlocks the ability to target those leads online



An additional donor revenue channel to support your future

2024 “Chapter Choice” Digital Options

With TrueSense Marketing’s expertise, coupled with our deep knowledge of Chapters’ current and near-future digital objectives, we’ll be offering “Chapter Choice” digital fundraising packages specific to RMHCs.

Ideally, we’ll be able to shepherd 80% of Chapters into the Growth level by 2026, positioning them to not only grow but to sustain their digital programs. Utilizing modern tech and automation strategies, these programs are inclusive of robust email marketing programs, digital acquisition efforts, paid media, quarterly reporting, and optimization opportunities.

Success in growth and custom choices require:

- **Technical platforms** that allow for seamless donor journeys
- **Access and tracking** in place for measuring performance
- **Investment in digital media** for reaching prospects and donors

| Custom | | |
|--|---|--|
| Growth | | |
| Essential | | |
| <ul style="list-style-type: none"> • Continuation of email “wrap” campaigns for DM donors • Email standalone campaigns to DM & digital donors for Giving Tuesday, Calendar Year-End • Google Ad Grant | <ul style="list-style-type: none"> • All included in Essentials + • Year-round digital new donor acquisition & lead generation • Whole file (including <u>housefile</u>) email strategy, segmentation & reporting • Whole file email file hygiene, e-appendes & delivery monitoring • Email automation series • Website donation forms optimized for converting site visitors to donors | <ul style="list-style-type: none"> • Unique strategy, resource & media plan integrated with your local activations & digital marketing efforts • Custom program focused on best practices with chapter-customized digital and media strategies |

Contingent on RMHC Chapter having necessary technology, website tracking and TSM access in place

TrueSense is ready to help you clear obstacles that can prevent you from experiencing the digital donor growth that national nonprofits are already seeing — just as we did in direct mail.

Custom Digital Strategy + Industry-Leading Delivery = Excellence

The constituent (donor, prospect) is at the center of everything our digital teams do. Your audiences are used to first-class digital experiences when they shop and browse the Internet on their phones and computers. Nonprofits typically struggle to provide commensurate experiences. That's why our objective with every client and every campaign is to create the best digital experiences for the constituent as we possibly can across website, email, social, and digital advertising channels. By meeting their user expectations, we're not just making it easier for them to donate, we are demonstrating a donor-centric approach from the beginning of their relationship with you that sets the standard for future communications.



Our Digital Team includes strategists, developers, and creatives — with subject matter expertise in search, social, programmatic display, and email — integrated across the business units that support our client teams. We are proud of their accomplishments and innovations.

Our team members are fully able to support digital efforts in house. We also work collaboratively with client teams and other agencies to coordinate efforts where and when needed to benefit our clients and the success of their campaigns.

2. More Monthly Donors

You have begun growing your number of Monthly Donors through your mail and digital initiatives with TrueSense:

- RMHC Chapters acquired more than 1,100 monthly donors in 2022, generating upwards of \$31,000 in annual revenue.
- 16% of monthly donors were acquired through an upsell conversion lightbox at the point of transaction.
- Monthly donors are giving on average \$26 per month, \$312 per year.

You'll have the chance to gain more of these high-value donors in 2024 with a multichannel approach to convert more of your existing donors into Monthly Donors and have new donors make their first gift a monthly gift.

| | Mail | Phone | EveryAction Lightbox | Website & EA donation pages | Paid Media | Email Marketing |
|---------------------------------|------|-------|----------------------|-----------------------------|------------|-----------------|
| Convert donors you already have | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Acquire more | | | ✓ | ✓ | ✓ | ✓ |

MAIL & PHONE

Your Caring and Comforting Hearts donors are already committed to recurring giving. Our Donor Engagement Team will call to thank them for their giving and offer automated monthly giving for their convenience and so that the donors' dollars go even further. By using our proven GPS Sustainer model, we'll expand this donor group to include others who are likely to convert to Monthly Giving and call those donors as well. Coordinated mail offers will support calling efforts.

SUSTAINER-FIRST APPROACH

We will continue using the monthly gift upsell light box on the donation form we manage for you in EveryAction. We also recommend RMHC Chapters position a monthly ask first (as opposed to one-time gift) throughout their website properties and content. Performance shows that this increases monthly donors without detracting from one-time gifts. (Example shown here.)

Can we count on your continuing support? ✕

Monthly giving is one of the most important ways to sustain our programs every day of the year, and it's a more convenient way to make a bigger impact over time. Before we process your one-time gift, will you consider converting it into a smaller monthly gift of \$12.00 instead?

Yes! Change my gift to \$12.00 a month

No thanks, complete my one-time gift of \$41.63 only

If you join our monthly giving program, your first monthly gift will process today. If you decline the offer we will continue to process your one-time gift. You can update or cancel at any time.

MULTICHANNEL ACQUISITION

We will showcase the monthly offer across your paid digital advertising, including leveraging site links and ad extensions in your search engine marketing ads. If a donor is searching with the keyword "donate," they are primed to give, so direct that ad link directly to a monthly giving form to reduce friction and provide a seamless user experience. (Ad extension example below.)

Ad - <https://www.rmhc.org/>

Help Families In Need - Support Our Mission - RMHC.org

Ronald McDonald House Charities® Mission Is To Create, Find & Support Programs. That Directly Impact The Health And Well-Being Of Children & Their Families. Four Star Charity.

Donation Boxes - RMHC Near You - Get Involved - How We Make A Difference

CARE, FEEDING, & RETENTION

Nothing about a sustainer program is "set it and forget it!" We know the automated, multichannel strategy to prevent sustainers from lapsing, to retry credit cards upon decline/expiration, and to reactivate those donors.

Sample of Success

**The Salvation Army Golden State Division
Donor Engagement Calling 2019
increased monthly donors from 90 to 234.**

3. Acquisition Advancement

Our eye toward continuous improvement has us adding more data management in house in 2023. While we have handled donor data and donor file processing in house for over a decade, we — like most agencies — worked with a list broker to source prospect rental lists. We are now moving acquisition processing in house and working with coop database providers directly. This increases data security, with less data handling by third parties, and allows us to leverage our advanced modeling and analytics for prospecting. Our massive demographic data set will be instrumental in prospect modeling, including generating new list universes available for acquisition. The outcome of this change is two-fold for you: **enhanced data security and improved new donor acquisition outcomes.**



4. Fast-tracking Acknowledgments

Together with DMP (the gift processor we've contracted with for RMHCs), we've reimagined the donor acknowledgment process.

As of Q3 of 2023, we are cutting acknowledgment time in half by moving to **daily gift processing** by DMP and **gift entry** by TrueSense. We will return data files to DMP daily after our gift posting to the EveryAction database, and DMP will immediately print and mail acknowledgments to donors.

Integral to expediting this process are some changes to our Database Administrator position which will further strengthen the connection between donor database and donor cultivation/retention.



5. Amped-up personalization of appeals

We have always operated as an end-to-end agency, covering all aspects of the direct mail fundraising process: from strategy development to analytics, creative design, data management, and production of the mail itself.

This integrated approach ensures seamless coordination between the different stages of campaigns, leading to efficiency and streamlined workflows. By having this full set of capabilities in-house, combined with the power of robust GPS-driven data, we can also offer greater localization, customization, and responsiveness to your needs while creating a more one-to-one donor experience.

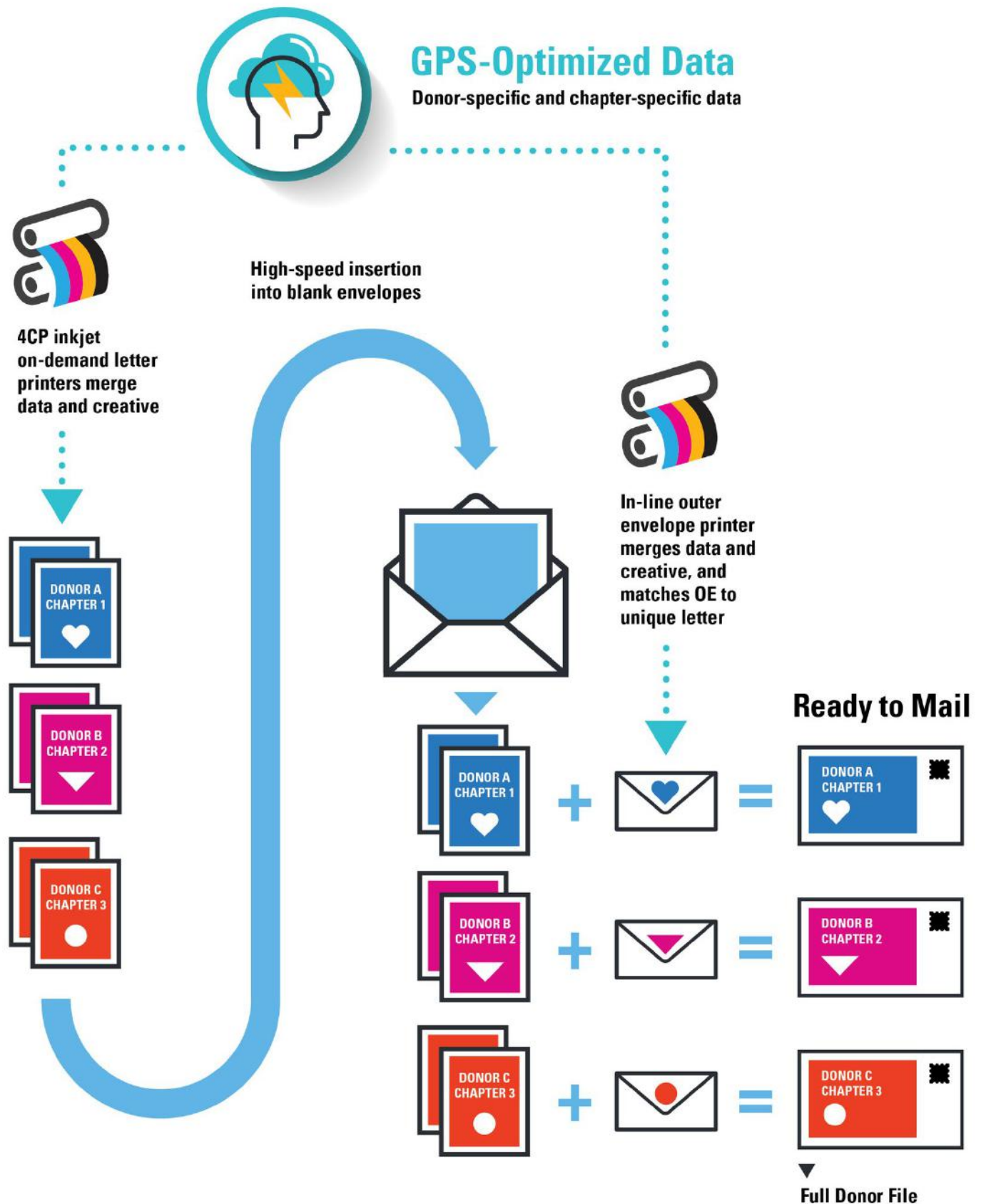
Recently, we have made significant investments in the latest direct mail technologies that will further fuel all of these advancements, including:

- **4CP (Four-Color Process) Inkjet on-demand personalization printers.** These printers allow for us to leverage robust data and deliver personalized creative versioning on letters/forms within a single production package. Not only does this create a more customized piece, it enables greater postal discounts and efficiencies as well.
- **State-of-the-art high-speed inserting equipment.** These new inserting machines dramatically increase the throughput of direct mail insertion and speed to market.
- **In-line creative personalization on the outer envelopes.** This machine, which is attached to the high-speed inserter, also enables us to leverage data to deliver more customized one-to-one messaging by client and by donor, leveraging all data, graphics, and client branding together in one process. This machine can also perform stamping and pre-cancel markings when the creative approach requires it.

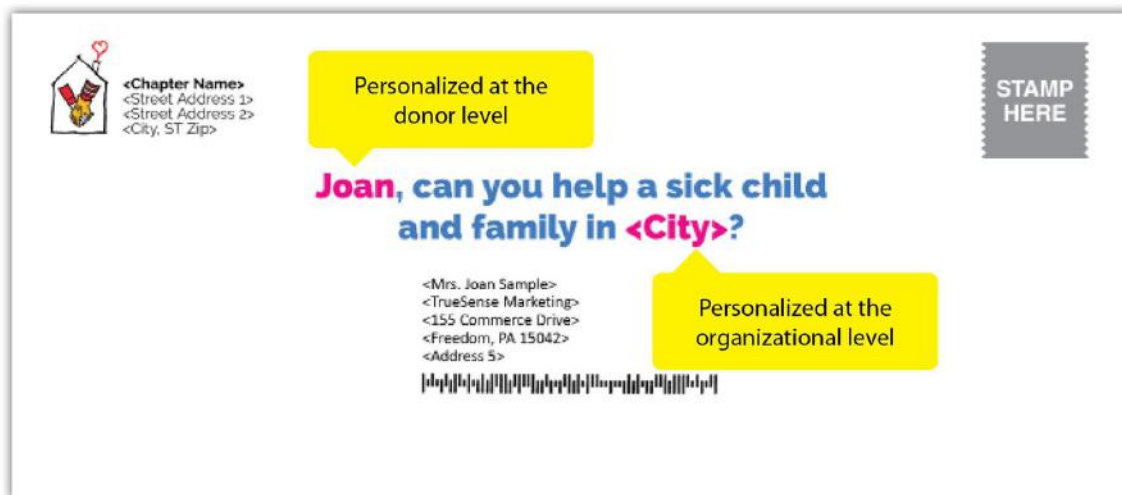
The power of this new equipment is illustrated in the following graphic, and can bring next-level technology and customization to your direct mail fundraising program.


We've also mocked up examples of how this could play out in our creative solutions for your program to maximize the personalization and localization by chapter and donor, and show the ways more one-to-one, data-driven direct mail can play out.

How this next-level technology works



How we can use data-driven customization for you




 <Chapter Name>
 <Street Address 1>
 <Street Address 2>
 <City, ST Zip>


Personalized at the donor level

STAMP HERE

Joan, can you help a sick child and family in <City>?

<Mrs. Joan Sample>
 <TrueSense Marketing>
 <155 Commerce Drive>
 <Freedom, PA 15042>
 <Address 5>

Personalized at the organizational level





 <Chapter Name>
 <Street Address 1>
 <Street Address 2>
 <City, ST Zip>

Donor name personalization

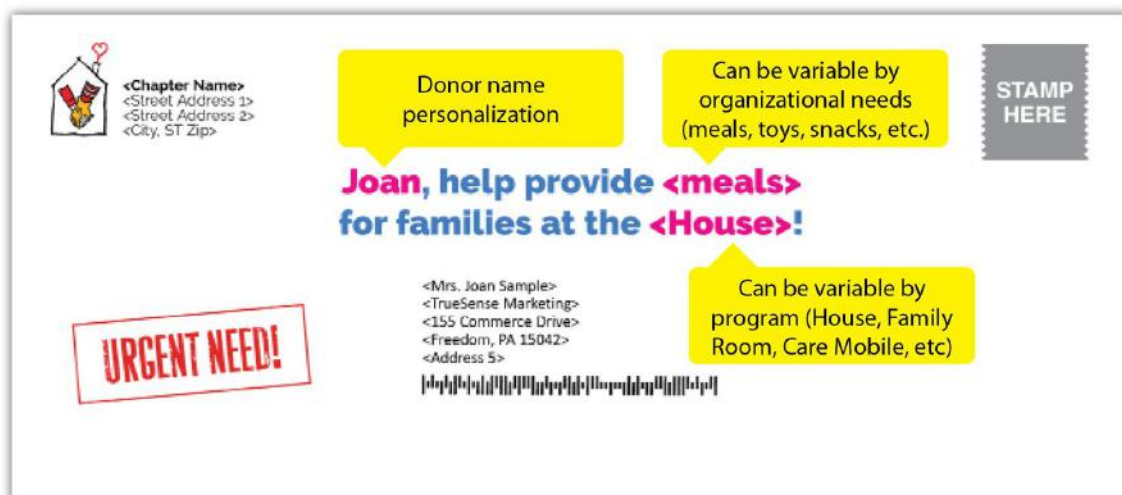
STAMP HERE


Matching Challenge
DOUBLES Your Gift

Joan, your last gift of \$35 is worth \$70 today!

Personalized based on a donor's most recent gift

<Mrs. Joan Sample>
 <TrueSense Marketing>
 <155 Commerce Drive>
 <Freedom, PA 15042>
 <Address 5>


 <Chapter Name>
 <Street Address 1>
 <Street Address 2>
 <City, ST Zip>

Donor name personalization

Can be variable by organizational needs (meals, toys, snacks, etc.)


STAMP HERE

Joan, help provide <meals> for families at the <House>!

URGENT NEED!

<Mrs. Joan Sample>
 <TrueSense Marketing>
 <155 Commerce Drive>
 <Freedom, PA 15042>
 <Address 5>

Can be variable by program (House, Family Room, Care Mobile, etc.)



6. Creative Evaluation Pre-Testing

Newly expanded in-house capabilities in market research bring even more power to our research-driven creative.

As you know, TrueSense conducts robust creative testing with RMHC Chapters appeals to continually advance results. Now, with our new Creative Evaluation “pre-testing,” we are able to identify creative concepts that are or are not as likely to succeed **before they are tested in the mailbox!** That means faster learning and lower risk in actual mail tests.

We leverage large research panels — screening for the target audience of charitable donors — and present elements of creative concepts in various forms as A/B testing to gain results on donor preferences.

| Test Element | Option A | Preference | Option B |
|--|----------|----------------------|----------|
| A. The person (portrait) B. The person in action (candid) | | B 35% to 65% → | |
| A. Caregiver focus B. Beneficiary | | B 39% to 61% → | |
| A. Lifted up B. Rescued | | A 57% to 43% ← | |

Top selections are evaluated in a final round for Comparative Strength in multiple segments to glean insights on the content that would perform best across various supporter segments, including general fund donors and mid-major donors across all age demos.

The insights from the Creative Evaluation research are used to fast-track the slower in-market testing. This allows us to test potential offers without risking any revenue or creating brand confusion.

We look forward to conducting this exciting research for you next year!




CLIENT CASE STUDIES

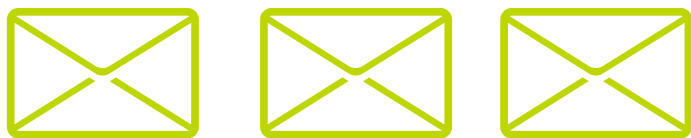
Ronald McDonald House Charities Chicagoland & Northwest Indiana

In February 2023, TSM launched a lead generation campaign centered around "Notes of Encouragement" for families at RMHC Chicagoland & Northwest Indiana.

Leads would enter the funnel through Facebook ads that showcased different cards available to send to children staying at RMH. Each ad linked to a landing page that subtly redirected to the donation form upon submission.

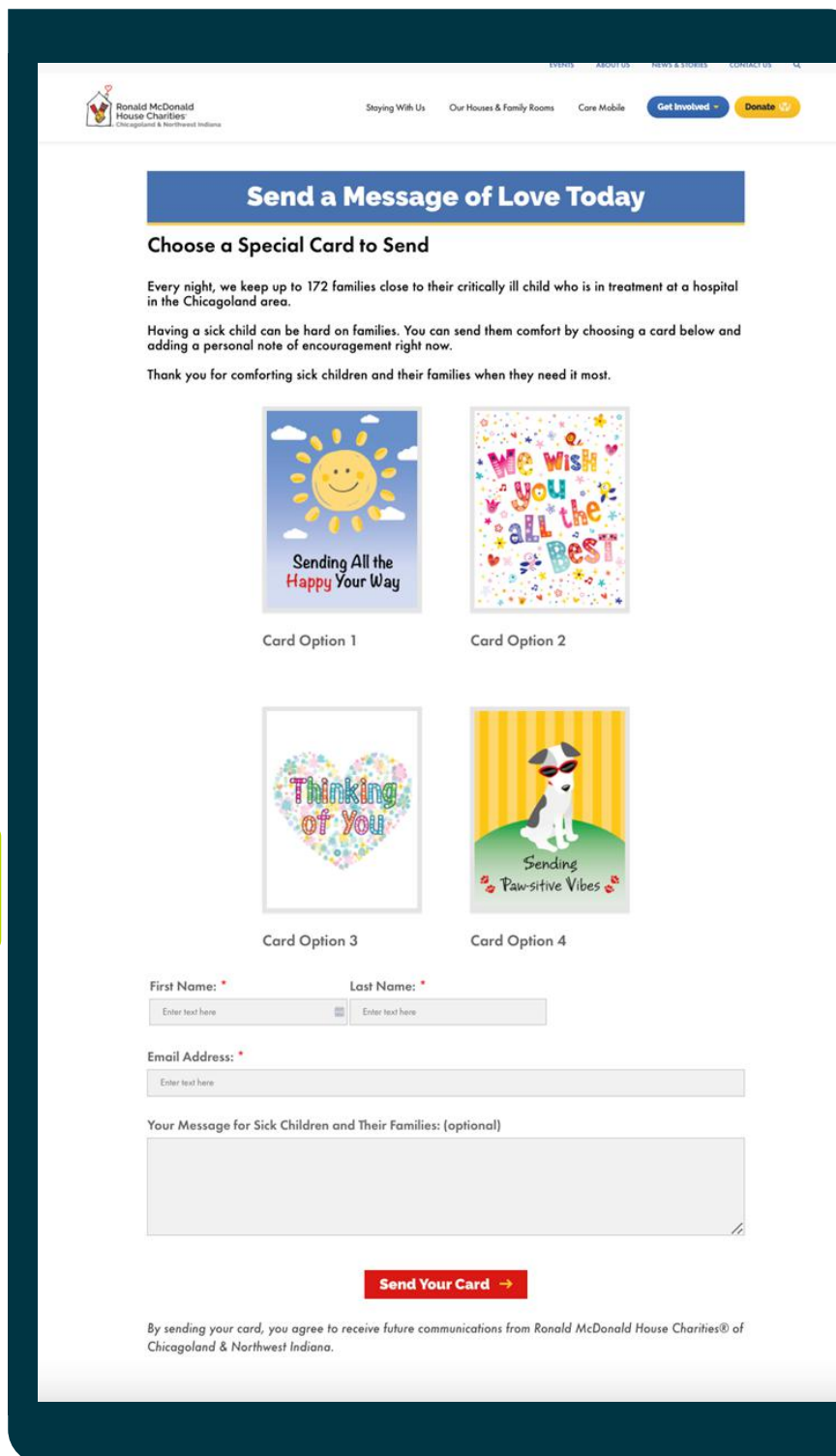
1,359 

NEW e-mail addresses
added to the file



3-Part Series

Automated e-mails that
serve to educate and convert
new leads to donors



The screenshot shows the website's landing page for the "Send a Message of Love Today" campaign. The page features a header with the organization's logo and navigation links. The main content area includes a section titled "Send a Message of Love Today" with a sub-header "Choose a Special Card to Send". Below this, there is a paragraph explaining the campaign's purpose: "Every night, we keep up to 172 families close to their critically ill child who is in treatment at a hospital in the Chicagoland area. Having a sick child can be hard on families. You can send them comfort by choosing a card below and adding a personal note of encouragement right now. Thank you for comforting sick children and their families when they need it most." Four card options are displayed in a grid: Card Option 1 (Sun with text "Sending All the Happy Your Way"), Card Option 2 (Text "We wish you all the BEST"), Card Option 3 (Heart with text "Thinking of You"), and Card Option 4 (Dog with text "Sending Pawsitive Vibes"). Below the cards, there are input fields for "First Name", "Last Name", and "Email Address", followed by a text area for "Your Message for Sick Children and Their Families: (optional)". A red button labeled "Send Your Card" is at the bottom. A footer note states: "By sending your card, you agree to receive future communications from Ronald McDonald House Charities® of Chicagoland & Northwest Indiana."

From April to June 2022, TrueSense executed a coordinated, paid media campaign for RMHC Chicagoland & Northwest Indiana's 45th Anniversary.

Creatives used a variety of framing (helping children, local pride, urgent needs) to boost response across paid search, paid social, and display.

Digital made up 65% of the campaign's total revenue at \$65K. In full, the campaign reached 107% of its goal.

10%

Overall Traffic From Facebook

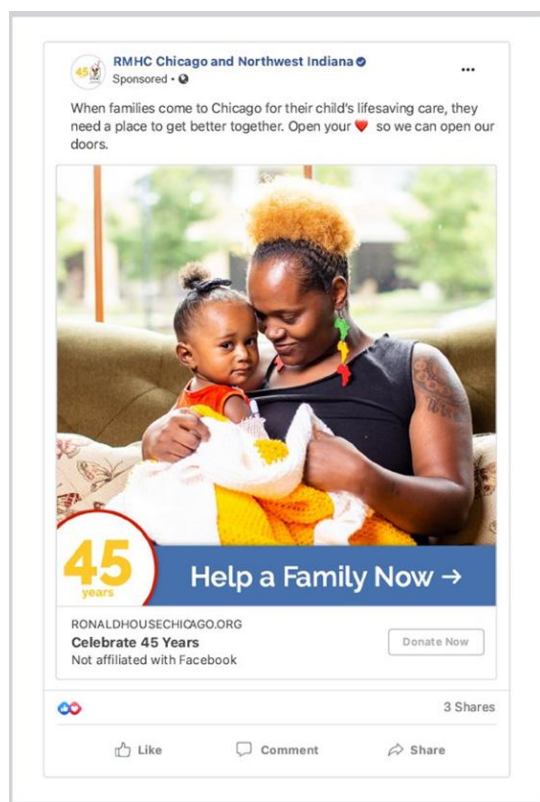
2.2

Return On Ad Spend (ROAS)

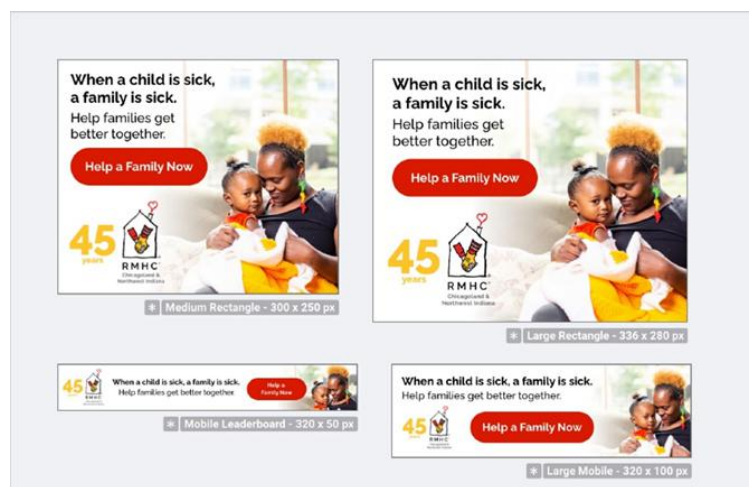
19%

New supporters From Facebook and Paid Search

\$65K in Revenue — 107% to goal!



Social Media



Display & Search



MONETIZING A GOOGLE AD GRANT

We manage the Google Ad Grant and paid SEM for a food bank client to capture brand and fundraising related traffic. While the paid search investment drives more impression share and revenue due to some of the restrictions on the Ad Grant, the Grant traffic provided nearly 10% of total revenue from the search channel.

Not only did we succeed in driving revenue from the Grant, this approach also defrayed the media cost, bringing down the cost per dollar raised for this client.

\$204K

Annual Revenue From
Google SEM

10%

of Revenue Driven From
Google Ad Grant

Google Ad Grants





Email Marketing: Impact of Personalization

Personalization in fundraising efforts has proven to improve campaign performance across multiple channels. TrueSense partnered with Roswell Park Comprehensive Cancer Center to improve email performance at calendar year-end.

In an effort to motivate donors to give at their highest level to date, we incorporated personalized ask amounts in the email and on the donation form by pulling in the donor's largest gift amount. By using the dynamic ask-string capability on the donation form, each donor was able to receive an ask array that aligned with the amount in the email.

We also incorporated a social proof callout feature, asking donors to double their largest gift.

These efforts paid off. **37% of donors gave their largest gift again, and 19% doubled their largest gift!** This success resulted in a blockbuster end-of-year campaign for the organization.



Personalized ask strings in email campaigns drive response and higher giving levels.





YoY Revenue Increase

71%



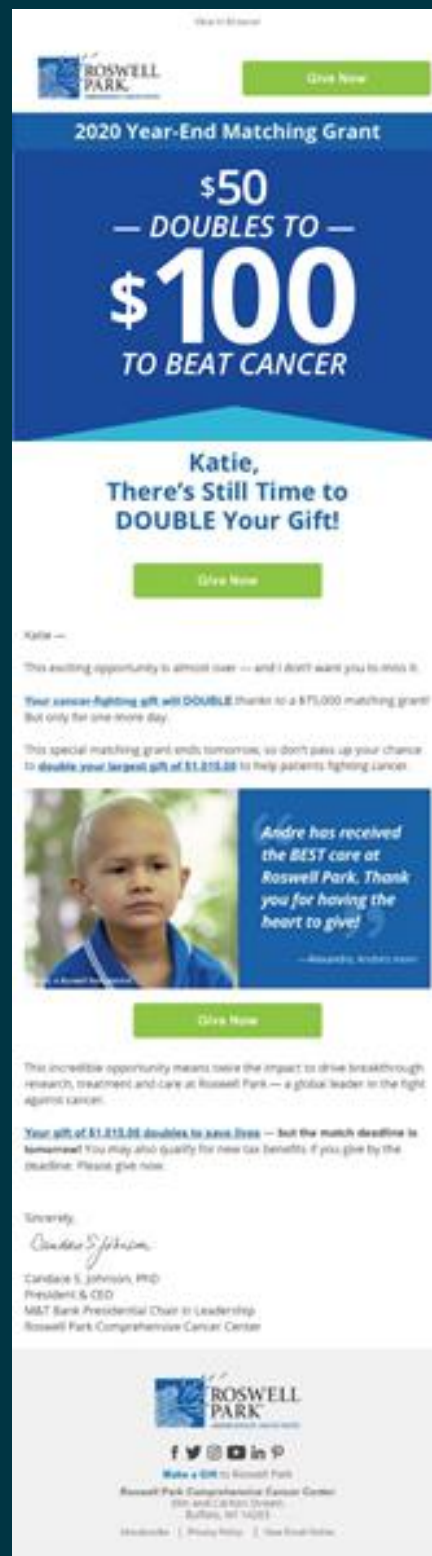
YoY Increase in Gifts

30%



YoY Avg. Gift Increase

31%



Katie —

This exciting opportunity is almost over — and I don't want you to miss it.

Your cancer-fighting gift will **DOUBLE** thanks to a \$75,000 matching grant! But only for one more day.

This special matching grant ends tomorrow, so don't pass up your chance to **double your largest gift of \$1,815.00** to help patients fighting cancer.

HIGHLIGHTS

Since 2020, this children's hospital has offered donors the opportunity to send a card to moms whose kids are hospitalized over Mother's Day. The email campaign has consistently driven strong engagement and high-quality user contributed content from prospects and donors alike.

Post-COVID, the number of card submissions had dropped, although revenue remained steady. In light of that, we decided to add a "comfort offer" to the involvement technique: Donors could now not only share a card, they could send a voucher for a cup of coffee, redeemable from a local cafe partner.

Results:

A substantial increase in gross revenue while engagement held steady

YOY REVENUE
+66%

1,485
CARD
SUBMISSIONS

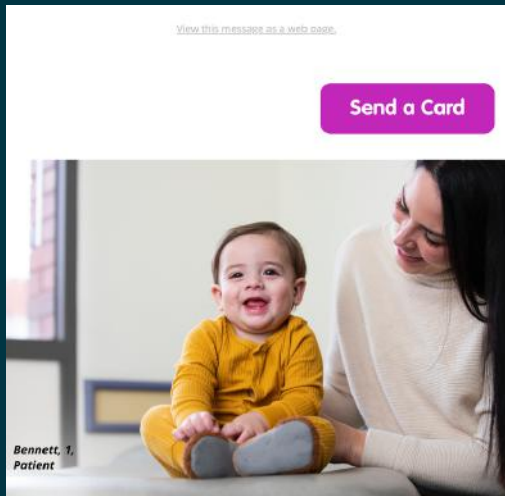
225 GIFTS

AVERAGE GIFT
\$30



EMAILS FOR CARD SUBMISSIONS

EMAIL 1: ENGAGEMENT



Send a Card

Send a Cup of Comfort for Mother's Day

Mother's Day is for pampering and appreciating moms. But this year, so many moms will spend their special day at their child's bedside, hoping their child will get better, sooner.

Here's how you can offer them love and encouragement with just a few clicks.

Just in time for Mother's Day, you can send a card and a comforting beverage to a family at Children's. Imagine how you'll warm hands and hearts when you send a coffee from a local partner.

All you need to do is choose one of the cards below. We'll deliver it, along with a voucher for a free beverage, to a mom or caregiver at Children's.

Choose Your Card



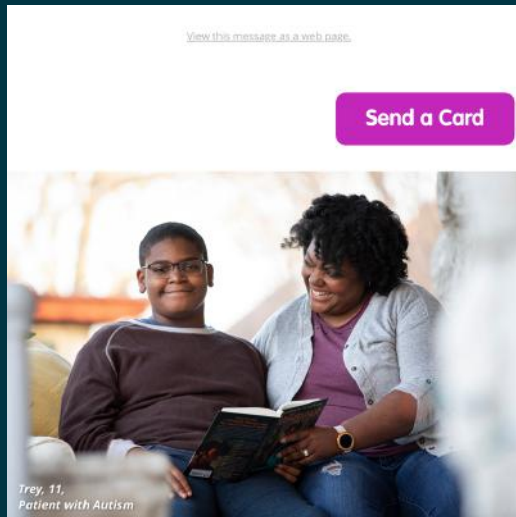
Send a Card

It only takes a couple clicks to send a cup of comfort. You can even add your own message of hope and support.

You'll remind a mom or caregiver how strong they are ... that they're not alone ... and you'll make them smile when they may need it most.

Thank you for making Mother's Day special.

EMAIL 2: ENGAGEMENT



Send a Card

Share Comfort, Love, and a Coffee Break This Mother's Day

Mother's Day is right around the corner. But even on their special day, the last thing the devoted moms and caregivers at Children's will be thinking about is themselves.

They're thinking of their children, and they need your love and encouragement more than ever.

This is your chance to send your best wishes — and a coffee break — just in time for Mother's Day. Choose a card, and we'll deliver it along with a voucher for a free cup of coffee to a mom or caregiver at Children's.

Send a Card and a Coffee Break

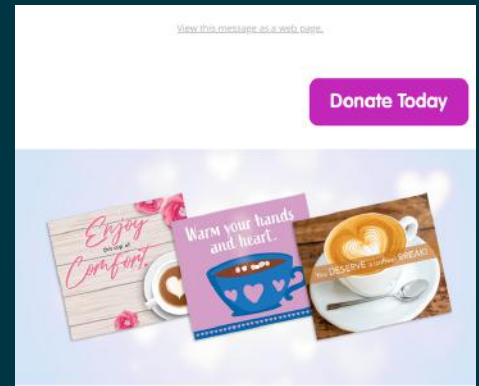


Send a Card

For a few minutes, you'll give a brave mom or caregiver a break. And you'll remind them that they've got champions like you on their side.

Families at Children's are focused on one thing this Mother's Day — helping their child thrive. **Thank you for showing them how much you care!**

EMAIL 3: INTRODUCING DONATE CTA



Donate Today

Share a Cup of Comfort: Matching Gift Challenge

A parent sitting by a bedside at Children's isn't thinking about flowers or a fancy gift for Mother's Day. They just want their child to get better. To go home healthier. To thrive in life.

Right now, you can make a life-changing difference by DOUBLING the healing power of your donation.

The Linda Watson Family Foundation, the R2 B4 Bramlage Family Foundation, and the Constance M. Cooper Charitable Foundation have joined together and will match your gift — dollar for dollar — up to a total of \$65,000 during the **Share a Cup of Comfort Matching Gift Challenge**.

And ... when you make your gift, you can send a card and a comforting cup of coffee to a family in the hospital — just in time for Mother's Day.



Send a Card + Donate

When you give, we'll deliver a voucher to a mom or caregiver at Children's. They can redeem it for a hot, comforting cup of coffee from a local partner!

Best of all, your generosity will go twice as far to give moms and families peace of mind by fueling the world-class care at Children's. And that's the greatest gift a mom could ask for today!

Thank you for brightening the day of moms and their families at Children's.

EMAILS LEVERAGING MATCH

[View this message as a web page.](#)

Match My Gift

Go a Step Further With a Gift That DOUBLES

It was so kind of you to send a card and a cup of coffee to a family at Children's. Thank you for reminding a caregiver at their child's bedside that they're not alone.

There's something else you can do to make a real difference, and right now, your compassion will go TWICE as far. You'll power life-changing care and innovative breakthroughs for children when you [make a donation today](#).

[Match Provider] will match your gift — dollar for dollar — up to a total of \$75,000 during the *Share a Cup of Comfort Matching Gift Challenge*.



Match My Gift

You've done so much to comfort a family at Children's. **This is your chance to make your generosity go twice as far to give moms and families peace of mind, by fueling the world-class care at Children's.** And that's the greatest gift a mom could ask for today! [Please give now](#). You can even send a card and a cup of comfort to another family!

Thank you for caring for the patients, moms, and families at Children's.

EMAIL 4

[View this message as a web page.](#)

Double My Gift



LIMITED TIME MATCH: Every Dollar Doubles for a Child Like Norah

This is big! For a limited time, your donation will support *twice* the loving care for kids and *twice* the hope for healthier tomorrows.

The Linda Watson Family Foundation, the R2 B4 Bramlage Family Foundation, and the Constance M. Cooper Charitable Foundation **have joined together and will match your gift** — dollar for dollar — up to a total of \$65,000 during the *Share a Cup of Comfort Matching Gift Challenge*. That means every dollar you give will go two times as far to fund game-changing research and find hope and answers for families.

Matching Gift Challenge Doubles Your Impact

\$50 becomes \$100

\$100 becomes \$200

\$250 becomes \$500

Double My Gift

This is the perfect time to help a child like 8-year-old Norah. She loves singing and performing scenes from *Rapunzel*, *Cinderella*, and *Snow White*. She visits Children's every month for chemotherapy and immunotherapy to help her battle cancer.

Norah believes in fairy tales, heroes, and happily-ever-after. This is your chance to be the hero in a story like hers. **Make a gift today to make groundbreaking research, new treatments, and cures a reality.**

The match deadline is May 31. [Thank you for doubling your impact today](#), and for being a champion for children.

With gratitude,

Nicki Johnson, CCLS
Director of Volunteer and Guest Services

EMAIL 5

NOTE: 25% OF ALL CAMPAIGN
REVENUE WAS GENERATED FROM
THIS EMAIL

[View this message as a web page.](#)

Double My Gift



Our matching gift challenge ends tomorrow, so this is your last chance to make a gift that DOUBLES to help kids and their families.

[Don't miss this chance to give, while every dollar goes twice as far](#) to give kids the best care possible. Thank you!

With gratitude,

Nicki Johnson, CCLS
Director of Volunteer and Guest Services

EMAIL 6

CARD SUBMISSION PAGE & DONATION PAGE

Choose Your Mother's Day Card

Select your card now. We'll deliver it to a mom or caregiver, along with a voucher, just in time for Mother's Day. They can redeem it for a comforting beverage from a local partner.

Don't forget to add your own message to remind a mom how strong she is!

Thank you for caring about children, and their special moms.



☐ You DESERVE a (coffee) break



☐ Warm your hands and heart



☐ Enjoy this cup of comfort

First Name*

Enter text here

Last Name

Enter text here

Email Address*

Email

ZIP Code

Enter text here

Message for a mom or caregiver (optional):

Sending you a cup of comfort, and warmest wishes for healthy days ahead!

By clicking **Finish**, I agree to receive future Children's Mercy communications.

Send Your Card

CARD LANDING PAGE ALLOWING DONORS TO CHOOSE A CARD AND SUBMIT A MESSAGE FOR A CAREGIVER.



DONATION PAGE: SEAMLESS FLOW OF CONTENT & PATIENT FEATURE



Matching Gift Challenge DOUBLES Your Impact

Right now, every dollar you give DOUBLES to find answers for kids. The Linda Watson Family Foundation, the R2 B4 Bramlage Family Foundation, and the Constance M. Cooper Charitable Foundation have joined together and will match your gift up to a total of \$65,000 ... but only until May 31.

This month, give moms and families the best gift of all: stronger, healthier kids and more time with their precious children. Thank you for being a champion for kids.

You can also leave a comment below to remind a mom how strong she is!

ONE TIME

MONTHLY

Choose a one-time amount

\$20

\$50

\$100

\$250

USD

\$ Other

☐ Dedicate my donation in honor or in memory of someone

Your Information

First Name *

Last Name *

☐ Don't show my name publicly. ⓘ

Email *

Your receipt will be emailed here.

☒ Please send me information about the impact of my gift and how I can continue to make a difference.

Phone Number

Send your message of hope to a mom or caregiver:

Questions

- Is this donation tax deductible?
- Where can I find my gift?
- Can you tell me more about the match funds?



Alonah, 5,
Patient with Cancer



Leveraging the Phone to Convert Donors to Monthly Giving

Strong sustainer relationships are characterized by a donor's willingness to commit to giving regularly.

In 2019, The Salvation Army Golden State Division made a significant investment in phone conversion strategies with the goal of increasing monthly giving membership to their branded program called **Army of Hope**.

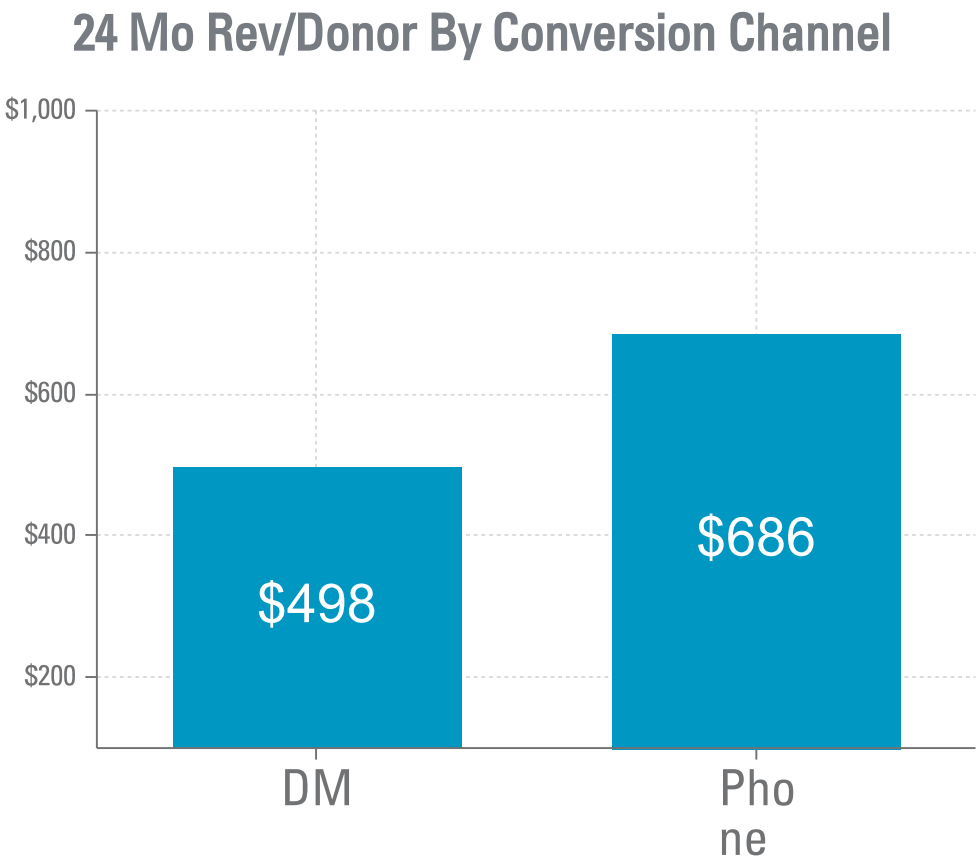


Army of Hope donors often give more than they commit to when they sign up — as much as **2x more**.

Phone-Converted Monthly Donors Give **37% More**

Following an analysis of the 234 monthly donors who joined the Army of Hope program via 2019 phone conversion efforts, we wanted to see what their giving looked like over time. We looked at the 24-month revenue per donor of phone-converted monthly donors compared to direct mail-converted monthly donors.

The value comparison below gives perspective on how the phone can help drive upgraded gifts and strong retention via deeper connections with donors.





Reactivating Lapsed Donors

As organizations struggle with dueling pressures to cap costs and grow revenue, RFM is too blunt an instrument to accomplish both. Broad RFM segments include donors who will not perform and also leave out donors who will.

Our proprietary GPS (Giving Potential Score) is an advanced segmentation strategy that goes far beyond RFM by leveraging machine learning to consider hundreds of data points on every donor. GPS optimizes your campaigns by each individual donor so you can trim the right records and bring in those who are currently overlooked.



**Ronald McDonald
House Charities®**
CHAPTERS

Imagine spending
less on campaigns
while maintaining
donor reactivation.

It's not magic,
it's math.

Lapsed Reactivation with GPS

The math in metrics....

As organizations struggle with dueling pressures to cap costs and grow revenue, RFM is too blunt an instrument to accomplish both. Broad RFM segments include donors who will not perform and also leave out donors who will. GPS optimizes your campaigns by each individual donor so you can trim the right records and bring in those who are currently overlooked.

The results below from **Ronald McDonald House New York** show February lapsed reactivation results for the previous two years. Since launching GPS in 2021, the quantity was nearly cut in half while maintaining growth in both gifts and revenue year over year.





Revenue

+20%



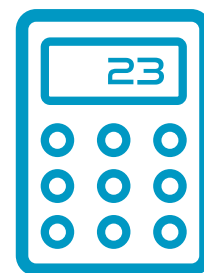
Cost

-50%



Response Rate

+96%



ROI

+139%

Case Study: K9s For Warriors Battle Buddies Day Multichannel Campaign

MEETING DONORS WHERE THEY PREFER TO
COMMUNICATE, ENGAGE, AND GIVE

HIGHLIGHTS

Determined to end veteran suicide, K9s For Warriors provides highly trained service dogs (most rescued from high-kill shelters) to military veterans suffering from PTSD, traumatic brain injury, and/or military sexual trauma.

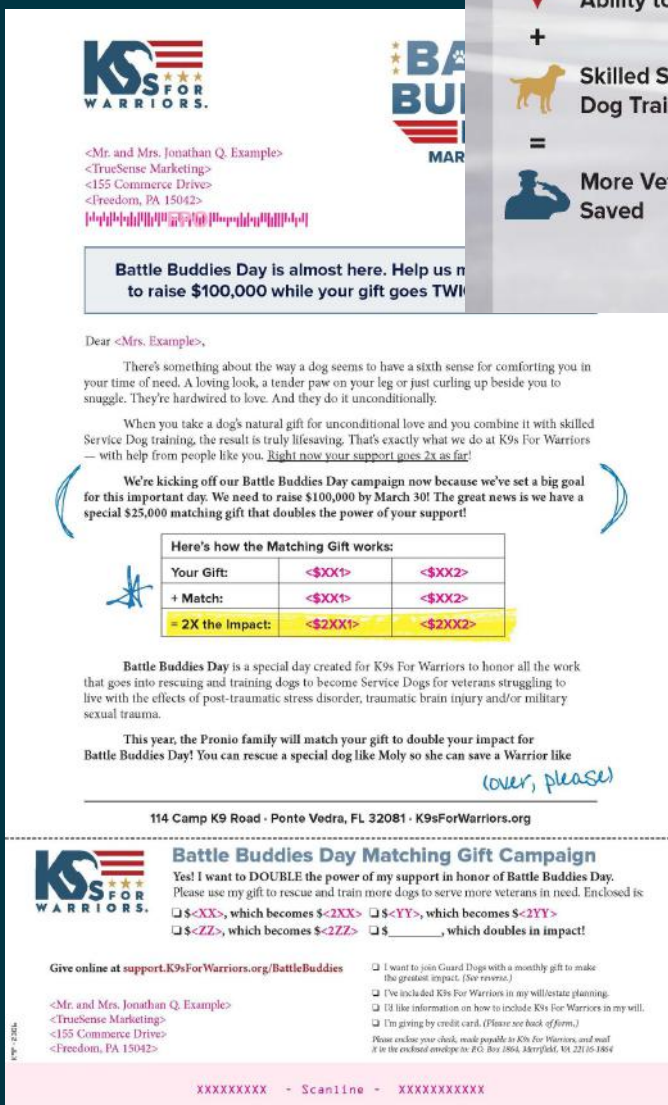
We launched the **Battle Buddies** Day campaign for the first time in 2022 on an expedited schedule that limited our ability for channel expansion.

In 2023, we expanded efforts to include more digital and a reimagined direct mail package that carries through all channels.

The results: The integration of the expanded digital touches dramatically boosted performance of an already solid campaign.



DIRECT MAIL

MEETING DONORS WHERE THEY PREFER TO
COMMUNICATE, ENGAGE, AND GIVEOUTER ENVELOPE
FACEOUTER ENVELOPE
BACK

LETTER/REMIT



DIRECT MAIL

MEETING DONORS WHERE THEY PREFER TO
COMMUNICATE, ENGAGE, AND GIVE**About K9s For Warriors**

K9s For Warriors is the nation's largest provider of trained Service Dogs for veterans. We are determined to end veteran suicide by providing highly trained Service Dogs to veterans suffering from PTSD, traumatic brain injury and/or military sexual trauma. Most of our dogs come from high-kill shelters, meaning your support helps save two lives — a dog and a veteran in need of a Battle Buddy.

What is a Battle Buddy?

For Marine veteran Quinton, his battle buddy Moly means hope. Healing. Heart. She offers the unconditional love and skilled training only a Service Dog can provide. Our battle buddies are trained to always be at their Warriors' sides.



"She's the best life present I could've ever received. There's no greater gift than the gift of living."

— Quinton, U.S. Marine veteran



114 Camp K9 Road
Ponte Vedra, FL 32081
K9sForWarriors.org

K9-2307



Unconditional
LOVE
Meets Intensive
TRAINING



The story of Moly and Quinton

DIRECT MAIL INSERT

**Meet Moly**

Moly was one of four dogs who came to K9s For Warriors rescued from an animal cruelty case. She was saved along with 30 other dogs.

We worried she wouldn't be able to trust humans. But it quickly became obvious that this sweet girl still had love to give.



"It's a rough world, so why not have someone like Moly to fight the battle with?"
— Moly's Warrior, Quinton

**Moly's Training**

In addition to basic commands like sit, stay and come, our dogs are trained to be skilled Service Dogs. They are taught a variety of skills, including:

- Under — to crawl into a space
- Heel — to stand at the Warrior's side
- Watch your "six" — to keep an eye behind their Warrior
- Front — to move in front of their Warrior steadily
- Brace — to stand and brace to offer support for a Warrior
- Lap — to place their paws on a Warrior's seated legs, applying comforting pressure

For Moly, training began with trust-building with her K9 trainer Jacob and continued until she was ready to meet her Warrior.



Moly's trainer Jacob says he couldn't be prouder of how far she's come.

**Moly Meets Quinton**

EMAIL

MEETING DONORS WHERE THEY PREFER TO COMMUNICATE, ENGAGE, AND GIVE



K9S FOR WARRIORS [DONATE NOW](#)

+ Unconditional Love

[Name],

Dogs seem to have a sixth sense for knowing when they're smart, love to please and, best of all, they're loyal.

When you take all these natural gifts and you combine them with Service Dog training, the result is nothing short of amazing.

With Battle Buddies Day just around the corner and to be sure you know why that's so special!

What is a Battle Buddy?

In the military, a battle buddy is a fellow soldier and their buddy's back, on and off the battlefield. We're in heart, and here at K9s, our battle buddies are trained to always be at their warrior's side.

Meet Moly and Quinton

Ten-year Marine veteran Quinton knows exactly how strong the battle buddy bond can be. Just after being rescued from an animal cruelty case, Moly has battle scars of her own. With her by his side, Quinton feels ready to take his life back after years of suffering from PTSD.

It starts with YOU

The K9s For Warriors process all starts with support. [With today's help, we can rescue a dog and train it to be a hero.](#) Thank you for saving lives!

Sincerely,

Carl F. Crisco III
Carl F. Crisco III
CEO, K9s For Warriors

P.S. Battle Buddies Day — our annual giving day on March 30. If you don't already, be sure to follow us on social media for special content, live updates and lots of love!

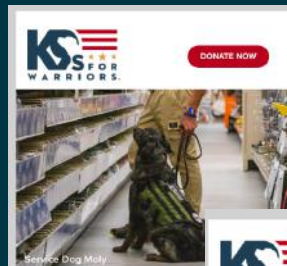
[DONATE](#)

825 Warriors served
More than **2,000** dogs rescued

[DONATE](#)

K9s For Warriors | 804-608-1399 | 114 Camp K9 Road, Pompano Beach, FL 33061
www.k9sforswarriors.org

EMAIL 1



K9S FOR WARRIORS [DONATE NOW](#)

Help Unlock a Matching Gift for Battle Buddies Day

[Name], when we find that perfect shelter dog, we're assessing temperament and trainability looking for a veteran in need.

It's a long and expensive process turning a loving Service Dog. As you may know, we don't charge our donors and our dedication to our Warriors is for life!

That's why we're excited to tell you about a BIG second annual Battle Buddies Day — a special day that's happening March 30.

Here's some great news: [If we can secure 30 dogs, we'll unlock a special \\$25,000 matching gift from the K9s For Warriors Foundation!](#)

Help Us Reach 30 Dogs to UNLOCK \$25,000

[GIVE NOW](#)

Many of the dogs we rescue have their own battle buddies. Moly was rescued from an animal cruelty case and other dogs. It took some time for her to trust people, but she's now a hero and the dynamic duo is together.

That's the power of your support. And if you can help, we'll match your donation to help us reach our \$100,000 goal.

Sincerely,

Carl F. Crisco III
Carl F. Crisco III
CEO, K9s For Warriors

[DONATE](#)

825 Warriors served
More than **2,000** dogs rescued

[DONATE](#)

K9s For Warriors | 804-608-1399 | 114 Camp K9 Road, Pompano Beach, FL 33061
www.k9sforswarriors.org

EMAIL 2



K9S FOR WARRIORS [DONATE NOW](#)

It's Battle Buddies Day!

Quinton first meeting Service Dog Moly

First 30 Gifts Will Be TRIPLED

[Name], it's here, and we're all excited — Battle Buddies Day is back and bigger than ever! This special day of giving is dedicated to the unconditional love and hard work of our battle buddy teams.

This year we've set a goal to raise **\$100,000** for Battle Buddies Day, and we can't do it without you!

Here's some exciting news: our friends the Crisco Family will match all gifts donated for Battle Buddies Day up to a total of \$25,000.

Be one of the first 30 supporters today and have your gift TRIPLED! That's \$12 for every \$1 you give!

DOUBLE YOUR IMPACT

Your support will rescue a dog like Quinton. When these two battle buddies meet, the world is a better place.

So many more dogs and veterans need Battle Buddies Day with a generous donation.

Sincerely,

Carl F. Crisco III
Carl F. Crisco III
CEO, K9s For Warriors

825 Warriors served
More than **2,000** dogs rescued

[DONATE](#)

K9s For Warriors | 804-608-1399 | 114 Camp K9 Road, Pompano Beach, FL 33061
www.k9sforswarriors.org

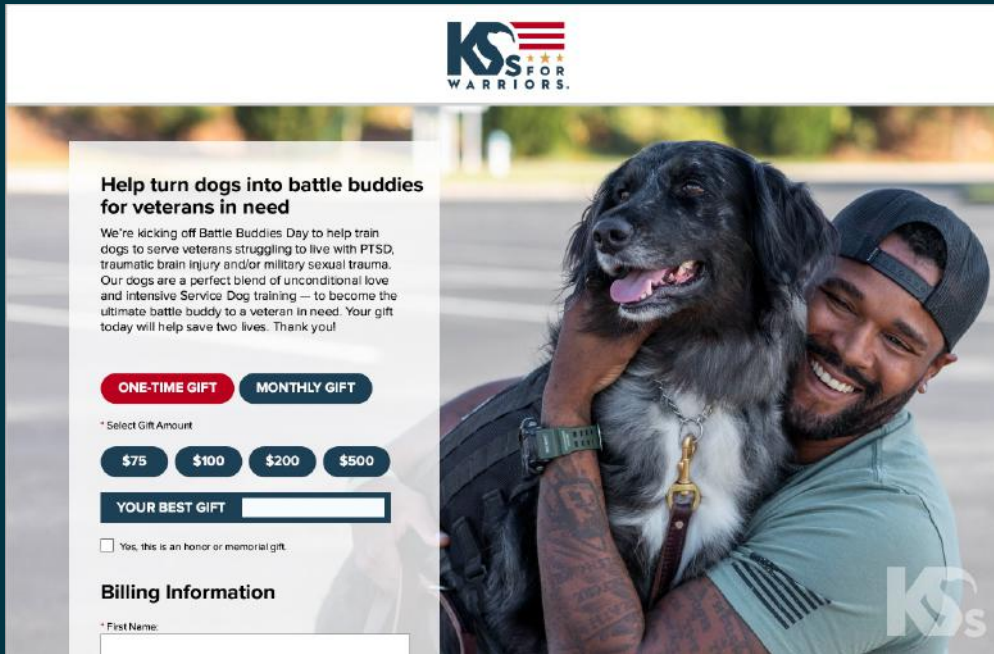
EMAIL 3

EMAIL 4

EMAIL 5

EMAIL 6- THANK YOU

EMAIL

MEETING DONORS WHERE THEY PREFER TO
COMMUNICATE, ENGAGE, AND GIVE

K9s FOR WARRIORS.

Help turn dogs into battle buddies for veterans in need

We're kicking off Battle Buddies Day to help train dogs to serve veterans struggling to live with PTSD, traumatic brain injury and/or military sexual trauma. Our dogs are a perfect blend of unconditional love and intensive Service Dog training — to become the ultimate battle buddy to a veteran in need. Your gift today will help save two lives. Thank you!

ONE-TIME GIFT **MONTHLY GIFT**

* Select Gift Amount

\$75 **\$100** **\$200** **\$500**

YOUR BEST GIFT

☐ Yes, this is an honor or memorial gift.

Billing Information

* First Name:

EMAIL DONATION PAGE
FEATURED 2 VERSIONS:
WITH AND WITHOUT
MATCH LANGUAGE

DISPLAY ADS



K9s FOR WARRIORS.

Your gift is matched

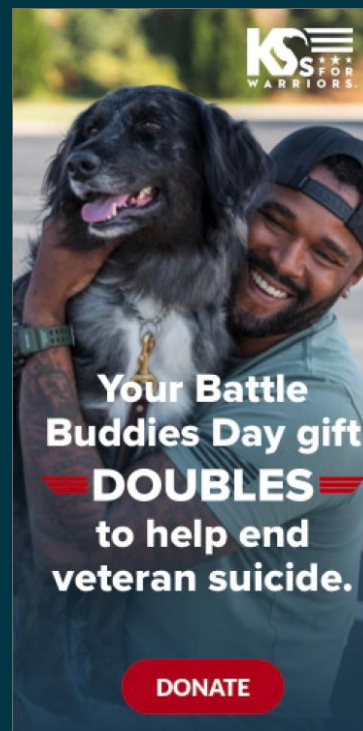
DONATE



K9s FOR WARRIORS.

Your gift is matched

DONATE



K9s FOR WARRIORS.

Your Battle Buddies Day gift

DOUBLES

to help end veteran suicide.

DONATE



K9s FOR WARRIORS.

Your Battle Buddies Day gift

DOUBLES

to help end veteran suicide.

DONATE

SOCIAL

MEETING DONORS WHERE THEY PREFER TO
COMMUNICATE, ENGAGE, AND GIVE

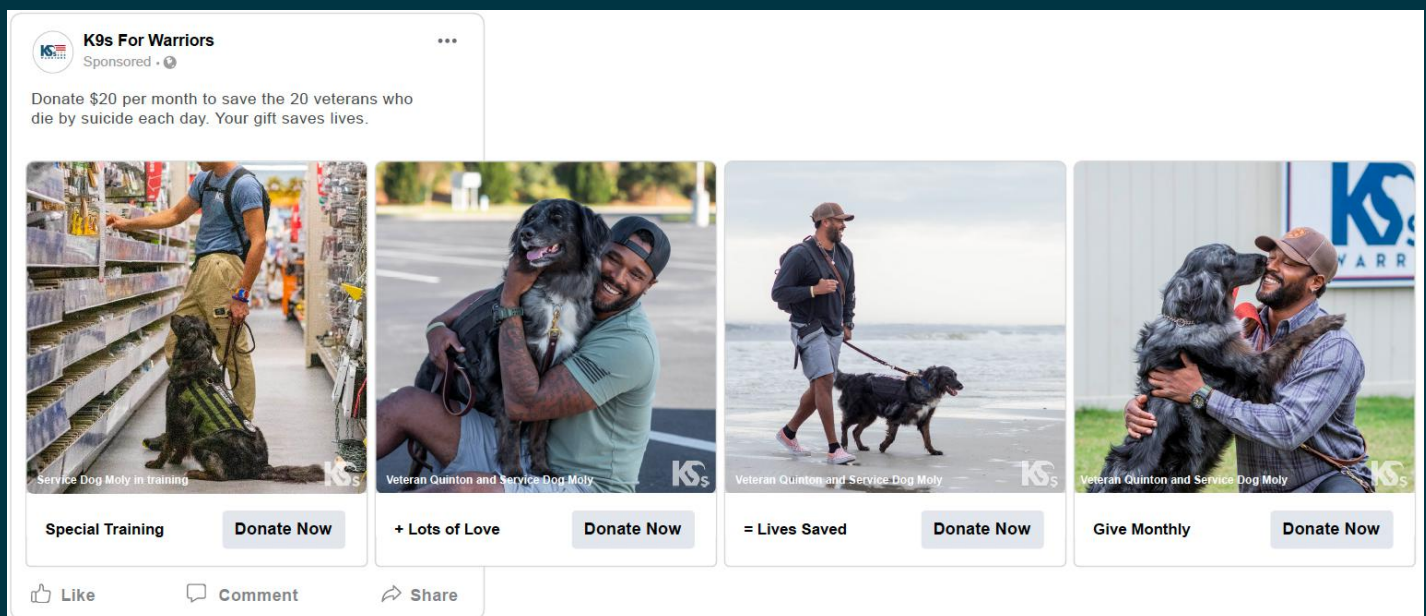
FACEBOOK STATIC



FACEBOOK ANIMATED



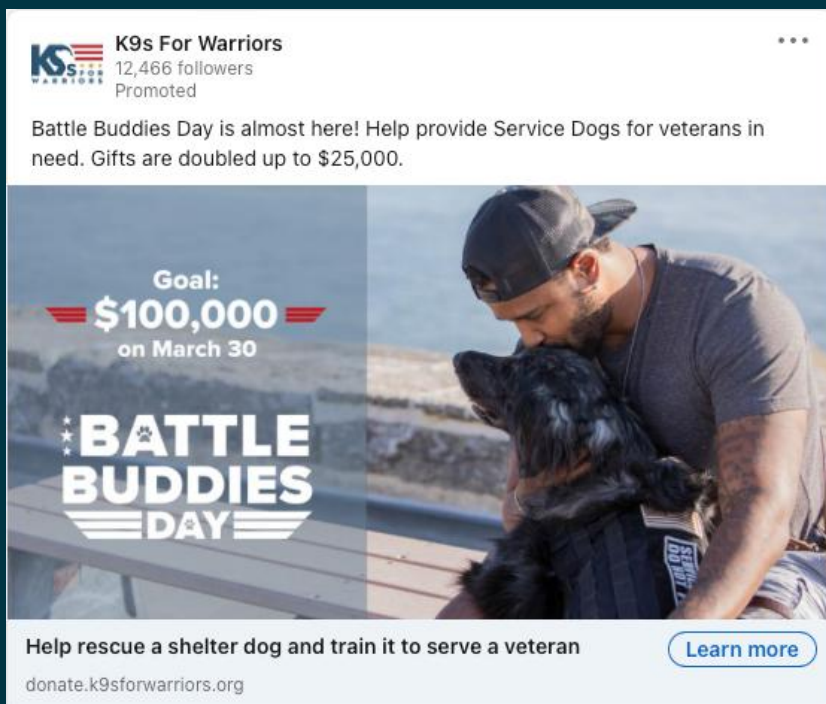
FACEBOOK CAROUSEL



SOCIAL

MEETING DONORS WHERE THEY PREFER TO
COMMUNICATE, ENGAGE, AND GIVE

LINKEDIN ANIMATED



LINKEDIN STATIC

RESULTS



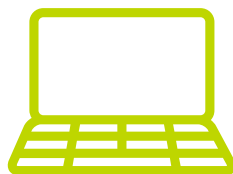
DIRECT MAIL



\$87,646

8.45% RR

DIGITAL

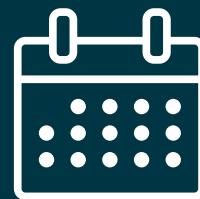


\$42,955

416 gifts

\$103.26 AVG

SUSTAINERS



\$740/mo

**24 New
Sustainers**

A PARTNER APART

We hope that the information in this RFP demonstrates how TrueSense is the best partner for Ronald McDonald House Charities Chapters. We sincerely hope that your experience with TrueSense over the years has been so positive in terms of both relationship and strategic leadership that you choose to continue it!

| Advantages | TrueSense |
|--|-----------|
| Extensive Experience & Success Managing RMHC Chapters Multichannel Direct Response Fundraising | ✓ |
| Analytics Driven with Proprietary Donor Health Index (DHI) Platform | ✓ |
| COMPASS Reporting (Cloud-based multichannel data platform) | ✓ |
| GPS (Predictive Modeling) for donor targeting that far out-performs traditional methods | ✓ |
| Google-Certified Professional Agency | ✓ |
| Primary RMHC Donor Research & Longstanding Control Packages | ✓ |
| Digital Fundraising Leadership and Collaboration | ✓ |
| In-House Donor Engagement Team (Phone Stewardship) | ✓ |
| In-House Print Production | ✓ |
| New Creative Development at No Additional Charge | ✓ |
| Volume Driven Pricing - Strategic/Production | ✓ |
| Known for Outstanding Client Service | ✓ |
| Caring and Comforting Hearts Sustainer Program | ✓ |
| Pay As You Grow Financing Agreement for New Chapters | ✓ |
| An Agency who will continue to care for you and take you into the future of fundraising | ✓ |