



A Partnership of Transformation

Envisioning a New Audience-First Strategic Partnership

A PROPOSAL TO
MARCH OF DIMES



June 2024



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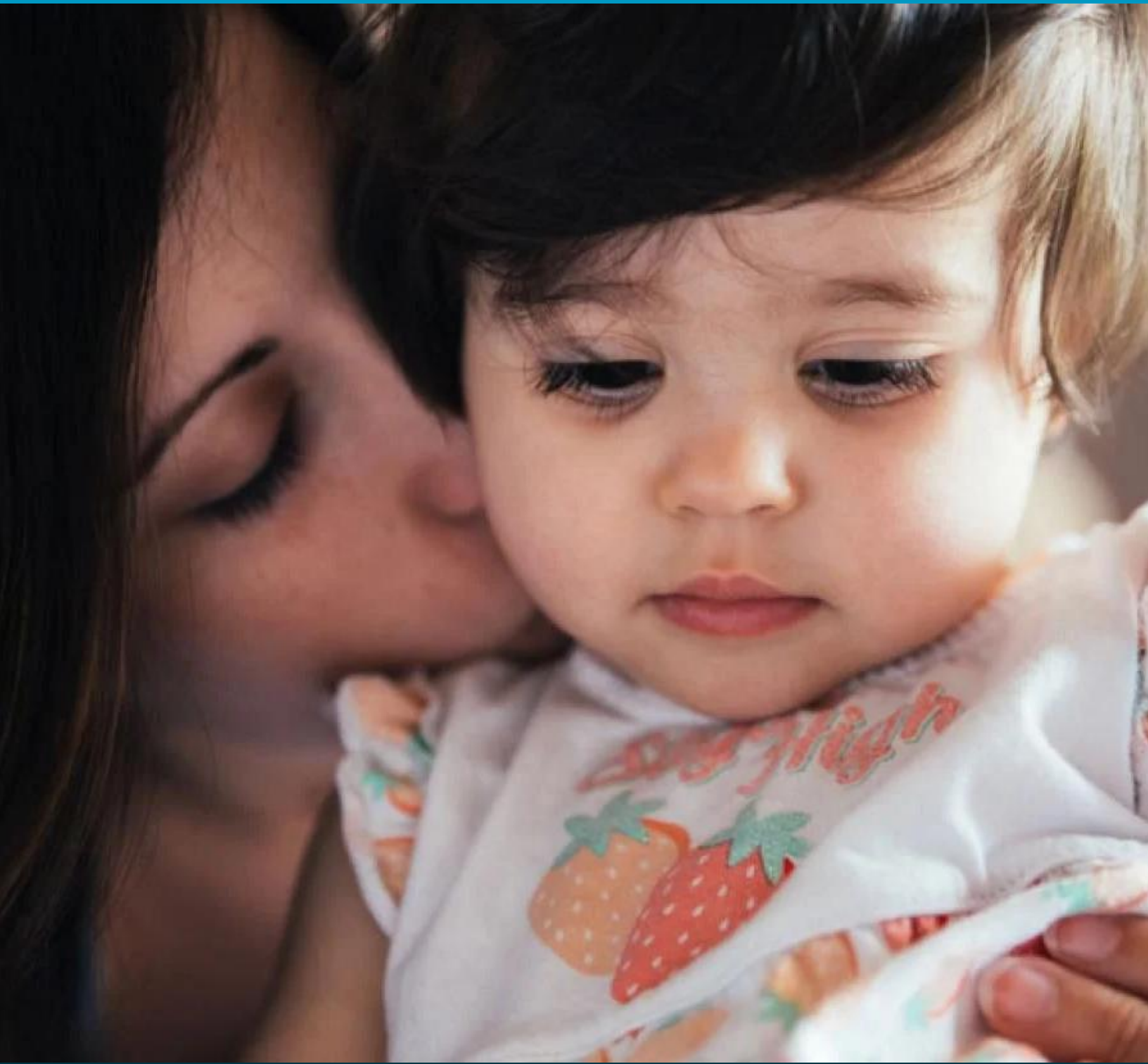
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3.1 Detailed Agency Information



A. Agency Overview

A1. History and Background: Share the agency's journey, highlighting milestones that demonstrate growth and expertise in nonprofit and omnichannel marketing.

History, Background, and Nonprofit Experience

In 1965, from his garage in Pittsburgh, our current CEO's father began producing direct mail campaigns for The Salvation Army, one of America's oldest and largest continuously active faith-based charities.

That printing and mailing business, Mailing Services of Pittsburgh (MSP), grew to be one of the leading direct mail production facilities in the U.S. In 2004, MSP spun off an agency arm, and in 2008, TrueSense Marketing emerged as a full-service fundraising agency brand, providing strategy and counsel to our nonprofit clients. By 2010, we were fully delivering donor marketing solutions online as well as in print.

Over the next 20 years, TrueSense evolved far beyond its roots, driving its data, technology, and talent growth away from channel-directed strategies and toward full, donor-centered omnichannel fundraising. In 2021, it became the principal business entity, folding the print and production into its channel service offering alongside the many digital and media channels we also support, all under a single P&L.

Today, TrueSense Marketing is a fully integrated donor marketing company, with virtually every component of our work residing within our corporate walls: data and analytics, data warehousing, campaign planning, media, digital/web development, creative, phones, printing/production, and everything in between.

We have made focused investments in the past few years in data technology, AI-driven modeling, targeting, and planning tools, as well as investments in subject matter expertise and operational efficiencies. In short, there is no direct marketing fundraising service that cannot be provided from within our unified agency operating system.

A2. Nonprofit Sector Experience: Detail specific experiences with health-focused nonprofits, including campaign types (awareness, fundraising, advocacy), outcomes, and how these experiences have prepared the agency for a project of this scope.

Nonprofit Sector Experience

Our deep experience in omnichannel fundraising solutions in the health-focused nonprofit sector will be demonstrated repeatedly in this proposal. We are proud of the longevity of our experience and service to some of the world's most recognized health-focused nonprofit brands, as well as numerous other organizations in related human service sectors.

CURRENT AND PAST (WITHIN 5 YEARS) HEALTH-FOCUSED CLIENTS:

- Seattle Children's Hospital
- Rutgers Health
- Children's Mercy of Kansas City
- Roswell Park Cancer Institute
- Children's National Foundation
- Massachusetts Eye & Ear
- Lurie Children's Hospital of Chicago
- Ronald McDonald House Charities
- Mayo Clinic
- Dana-Farber Cancer Institute

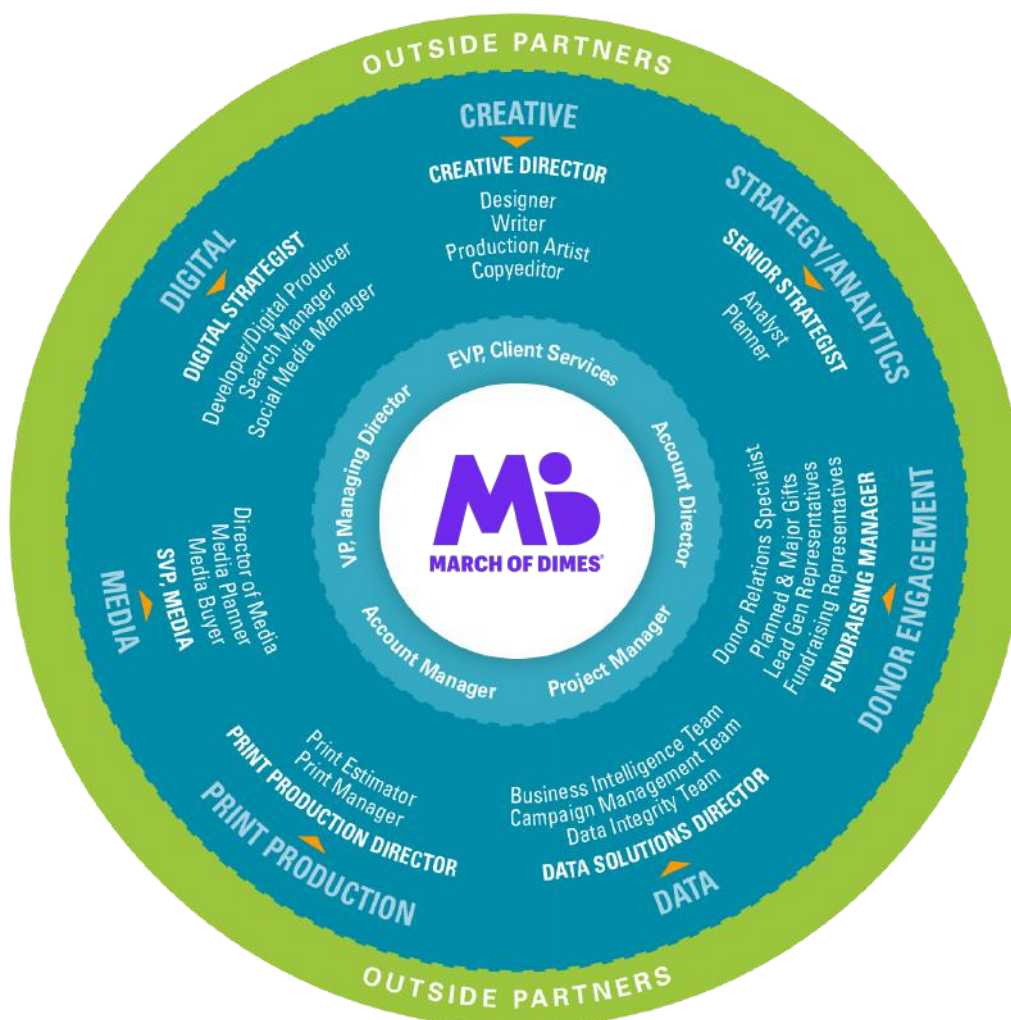
SPECIFIC PROGRAM EXPERIENCES WITH HEALTH-RELATED CLIENTS:

- Acquisition/Lapsed Reactivation
- Annual Fund/Annual Giving/Renewal
- Sustainer Acquisition & Conversion
- Grateful Patient Conversion & Cultivation
- Event Conversion
- Honor/Memorial Conversion
- Mid-Major Cultivation & Pipeline Growth
- Capital Campaign Support
- Managing Rebranding in Fundraising
- Donor Journey Mapping
- Fundraising/Marketing Collaboration
- Giving Days

A3. Key Team Members: For each proposed team member, provide a summary of their background, key projects they've led in the nonprofit sector, and their specific role in those projects.

Our Team, Ready to Serve You

We will staff a dedicated Client Services (CS) team to support you. This team works as your main point of contact for every aspect of your program. The CS team regularly draws insights from our in-house subject matter experts to develop and deploy the most effective strategies. Within each agency discipline, there are specialists assigned to you from Digital, Creative, Strategy/Analytics, Donor Engagement, Data, Print Production Management, and Media. This streamlined approach not only provides clarity for the client (Who do I go to for what?), but also ensures organized management of your plan and execution. At the end of the day, all our team members are dedicated to the success of our clients and love to be pulled into conversations as helpful.



While nearly all disciplines sit within our Full-Circle Fundraising model, additional outside partners would be brought into our planning as needed and will always have a seat at the table. This structure allows us to streamline our communications and bring a breadth of experience and staff together to develop and deploy strategies, continually evaluate performance, and course-correct as necessary.

See the pages that follow for background on the team handpicked to support you.

A3. Key Team Members: For each proposed team member, provide a summary of their background, key projects they've led in the nonprofit sector, and their specific role in those projects.

Heading Up Your Dedicated Team

As your partner, we will bring some of the best minds in the industry together to create a powerhouse team of strategists, creative direction, and account leadership to propel your program forward across all channels. Below are four key team members who will be focused on your program day in and day out.

[Click here to watch a video message from each team member.](#)



Katie Seger
VP, Global Strategy

Katie has over 15 years of experience managing multichannel fundraising programs, providing strategic, analytic, and creative recommendations for organizations including Feed the Children, Ocean Conservancy, Boston Children's Hospital, Animal Legal Defense Fund, Humane Society, American Diabetes Association, and many more. She is dedicated to advancing a wide variety of philanthropic missions, and her passion is implementing thoughtful and creative solutions to show measurable, long-standing benefits for nonprofit programs of all shapes and sizes.



Rebecca Hawkins
Senior Digital Strategist

With a decade of experience in the nonprofit and health care marketing sectors, Rebecca is passionate about bringing storytelling and strategy together to grow online fundraising efforts. Before joining TrueSense Marketing in 2022, Rebecca worked with organizations like the YMCA and Easterseals Southern California to lead digital marketing and fundraising efforts. Today, Rebecca serves as a Senior Digital Strategist leading digital planning and strategy for Children's Hospital clients and Roswell Park Alliance Foundation.



Erica Thornburg
Senior Account Director

With over a decade of experience in client management and three years at TrueSense working on a multichannel direct response program, Erica is a seasoned professional in client services. She has consistently demonstrated a strong commitment to delivering excellence and achieving impactful results for clients including Mercy Ships and Make-A-Wish. Most recently, Erica has led the team as the Senior Account Director on Feed the Children.



Autumn Melcer
VP, Creative Director

Autumn Melcer has more than 25 years of experience working in direct response fundraising, with a foundation in copywriting. She is passionate about serving nonprofits and is proud to work alongside her clients to help them fulfill their missions and make the world a better place. Autumn's agency roots began as a copywriter for a number of notable nonprofits. Most recently, she has served our children's hospitals vertical, Ronald McDonald House Charities, and Feed the Children as the assigned Creative Director.

A3. Key Team Members: For each proposed team member, provide a summary of their background, key projects they've led in the nonprofit sector, and their specific role in those projects.

Supporting Leadership

Your day-to-day team is supported closely by leadership from across the agency.



Melissa Roberts
Senior Vice President
Client Service

As Senior Vice President of Client Service, Melissa will serve you with the same high standards she has brought to clients like Mayo Clinic, Rutgers University, Feed the Children, and more. Melissa is responsible for moving the needle forward and for the functional success of her teams, clearing obstacles, ensuring necessary resources are allocated, and developing the tools that will advance their work — and thus your work. She understands omnichannel fundraising and will work closely with you to develop robust programs to meet your goals and objectives.



Matt Monberg
Senior Vice President
Integrated Strategy & Insights

Matt brings a long history in fundraising to his work leading the integrated strategy and insights team for TrueSense Marketing. With 25 years of fundraising experience, he has consistently inspired change, cultivated innovation, and achieved extraordinary outcomes. His expertise spans direct response fundraising, digital marketing, mid-level and major donors, and peer-to-peer strategies. Before joining the agency, Matt drove transformative growth at an international child development organization, significantly increasing revenue and supporter engagement. Matt's visionary leadership has left an indelible mark, exemplifying the power of combining passion, expertise, and strategic thinking.



Stephen Ferrando
Senior Vice President
Strategy & Analytics

Stephen is an industry thought leader with a focus on helping nonprofits succeed through the strategic use of analytics and technology. He has over 20 years of experience in direct response marketing in the commercial and nonprofit sectors. He was instrumental in advancing the fundraising efforts which raised hundreds of millions of dollars for national health charities including St. Jude Children's Hospital, Arthritis Foundation, and Mayo Clinic, with experience working with the largest brands in other charitable sectors like the Wounded Warrior Project, AARP, CARE, and more.



Jennifer Starrett
Senior Vice President
Data & Media

Jennifer leads our Media practice. She brings 20 years of experience in fundraising strategic planning and client management to her role. Her background provides our clients with solid media strategies that maximize budgets while generating the best ROI possible on their acquisition and media investments. She has served clients in nearly every fundraising sector, including health care, human services, veterans services, and many others.



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. Taryn's participation in the transformation of the newspaper industry to digital media naturally transitioned her to the world of digital everything, while remaining closely aligned with traditional (and still vibrant) TV, radio, and billboard outlets. As VP of Digital Media, Taryn works across all TrueSense clients to develop and optimize effective digital advertising campaigns to meet and exceed program goals.



René Putland
Vice President
Donor Engagement Team

René leads the Donor Engagement Team (DET) at TrueSense Marketing, which makes critical one-to-one connections with donors on our clients' behalf. René develops and oversees the personal contact strategies that are the basis of our grateful patient, mid-level, lapsed, new donor welcome, and upgrade initiatives. Her team has previously served MD Anderson with phoning for a capital campaign, supported the major gifts and annual fund areas, and made thank-you calls. Her team also handles mid-level solicitation, lapsed donor reactivation, and planned giving lead generation for many clients. Beyond her team's work with MD Anderson, she has also provided services to City of Hope and Cleveland Clinic, among others.

A4. Channel Expertise and Partnerships: List each marketing channel the agency specializes in, accompanied by examples of past work and any partnerships that enhance these capabilities, such as technology providers or content creators.

Channel Expertise

Our *Full-Circle Fundraising* model delivers management, strategy, analysis, creation, and production across virtually every donor marketing channel, without leaving our circle of in-house service provision. It's a silo-free business model that holistically delivers the unique services appropriate to your donors' preferences. Unless noted, all channels listed below are supported entirely by TrueSense teams, without outside partnerships.

Direct mail

Direct mail's ability to deliver personalized, tangible messages directly to donors' homes makes it a vital channel for engagement and fundraising. It also provides an excellent opportunity to integrate with digital campaigns, ensuring a seamless donor experience. Direct mail is foundational in direct response fundraising and is essential for reaching program goals and maintaining personal connections with donors. We not only have a rich understanding of direct mail strategy, but our in-house production facility allows us to cost-effectively scale the program but still manufacture high-touch packages and maximize ROI.

Email

As a core marketing channel and primary driver of digital direct revenue, email plays a significant role in our direct response campaigns. With the ability to cultivate and steward donors, our approach to email is to ensure that we are maximizing its fullest potential for your program by carefully balancing advocacy, cultivation, and affirmation touchpoints. We utilize email to generate donations, foster relationships, and create advocates through strategically crafted messaging and creative. Email's ability to reach large audiences effectively and affordably makes it an incredible tool, and its ability to synergize with direct mail and other direct response tactics makes it an integral tool for an omnichannel approach.

SEM

SEM is particularly effective for reaching audiences actively searching for related keywords, making it ideal for campaigns aiming to attract engaged and high-intent users. We decide when Search Engine Marketing (SEM) should be leveraged by evaluating your campaign objectives, such as increasing visibility, driving traffic, and generating conversions. Our team of paid search experts excels in all things Google and Bing, from traditional search to Performance Max, YouTube, Demand Gen, and whatever is next around the corner.

Display Advertising

Based on your campaign objectives — increasing brand awareness, engaging with a broad audience, driving conversions, etc. — we may recommend leveraging digital advertising. Our programmatic team manages display and more within the programmatic space (CTV, Native, DOOH, streaming). Their curiosity and expertise developed this team into nimble multimedia experts tasked with optimizing all things programmatic and cross-channel.

Social Media

Paid social media is effective for targeting specific audiences with tailored messages. It's ideal for campaigns aiming to drive high levels of interaction and support. Social media plays a pivotal role in every stage of the donor funnel and, thus, will likely be incorporated into a number of campaigns, matching customized messaging to the audience we are aiming to reach. With over 20 years of combined experience, our Paid Social team stays informed of the nuances within each social media platform and any platforms that may be up and coming.

A4. Channel Expertise and Partnerships: List each marketing channel the agency specializes in, accompanied by examples of past work and any partnerships that enhance these capabilities, such as technology providers or content creators.

SMS

With an open rate of 98%, texting is a powerful tactic for cultivating and engaging donor, event participant, and advocate audiences. When integrating text messaging and mobile marketing within a campaign, our focus is on crafting a message that is both concise and engaging. We start by evaluating how we can incorporate a level of engagement and interactivity through texting to keep our efforts with this tactic donor-oriented. With both brevity and impact in mind, we utilize text messaging throughout campaigns because it allows us to weave in personalization and automation into the donor experience. Our goal is to incorporate SMS/MMS creative where we blend messaging on direct donation appeals in an engaging, interactive format.

Livestream Fundraising

Livestream fundraising events are powerful tactical components when aligned with your goals. We consider factors such as audience engagement potential, fundraising targets, and the opportunity for real-time interaction. We also analyze your audience demographics and behavior to gauge their likelihood of engaging with and participating in a livestream event. Additionally, we assess the resources required to execute a successful livestream, including the necessary technology, staffing, and promotional efforts. This evaluation ensures that we can effectively plan and deliver a livestream event that meets your strategic goals and maximizes impact.

Telemarketing

Telemarketing facilitates direct, personalized communication with donors at various stages of their journey, enhancing engagement and fostering stronger donor relationships. Telemarketing is particularly effective for thanking donors, upgrading existing donors, moving donors to monthly giving, reactivating lapsed donors, and generating leads for planned giving and major gifts. At TrueSense, our Donor Engagement Team has a rich experience in cultivating relationships, surveying donors, and securing contributions via the phone channel.

Television

To decide if television advertising should be leveraged, we first assess your campaign objectives, such as raising awareness, reaching a broad audience, and driving upper-funnel engagement. Television's ability to deliver high-impact messaging to large audiences makes it an ideal choice for campaigns aiming to enhance brand visibility and generate widespread interest.

NOTE: Depending on complexity and strategic needs, we may occasionally partner with outside vendors for identified support in TV campaign management, including production/post-production, call centers, and media selects.

EXAMPLES OF PAST WORK

Numerous examples of our past work in all channels are on display throughout this document, but we direct you specifically to the case study you requested with your additional question on channel synergy (STRATEGY AND APPROACH | CASE STUDY #2) for good visual examples of our work.

A4. Channel Expertise and Partnerships: List each marketing channel the agency specializes in, accompanied by examples of past work and any partnerships that enhance these capabilities, such as technology providers or content creators.

Channel Partners: CRM and Platforms We Work With

CRM PLATFORMS



EMAIL PLATFORMS



DONATION PROCESSING & FORMS



MARKETING AUTOMATION



DIGITAL MEDIA MANAGEMENT



Digital Accreditations

We partner with our clients to craft and execute integrated digital programs to meet fundraising and brand goals. We handle simple and complex digital marketing programs fully in-house. We are thrilled to be a member of the Google Ad Grants Certified Professional Community, a Google Ads Premier Partner, a Microsoft Advertiser Partner, and a Meta (Facebook) Agency Partner.



A4. Channel Expertise and Partnerships: List each marketing channel the agency specializes in, accompanied by examples of past work and any partnerships that enhance these capabilities, such as technology providers or content creators.

MEDIA | Reaching Donors Where They Are

Reach is about delivering the right content to the right consumers via the right channels.

At TrueSense, our media team develops and optimizes media plans for our clients across numerous channels and mediums. Our in-house media team has rich experience executing plans to reach your donors where they are. While certain mediums are still the most likely to receive a directly attributable gift, in today's world, everything can affect everything else!

Expertise in Execution Across Platforms

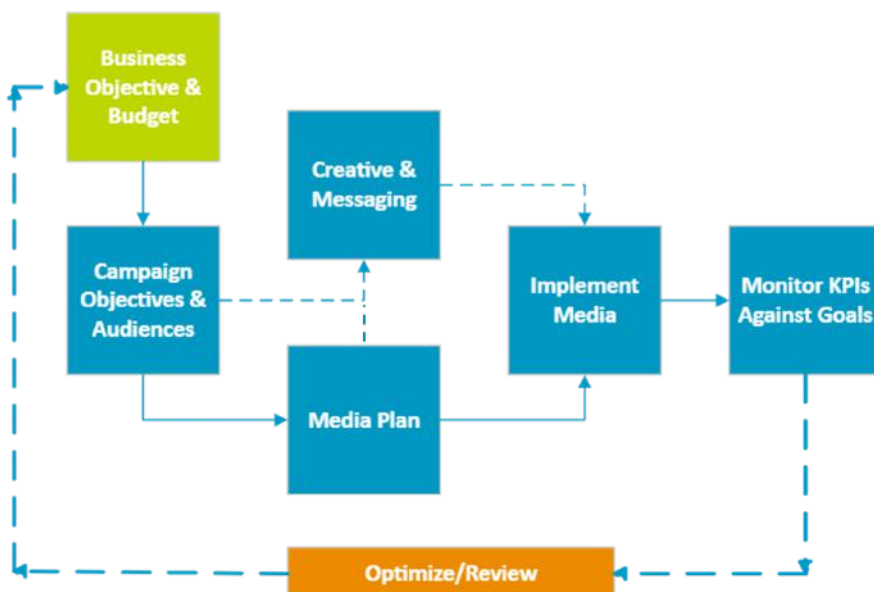
The TrueSense media team has executed campaigns across dozens of channels and mediums, including:

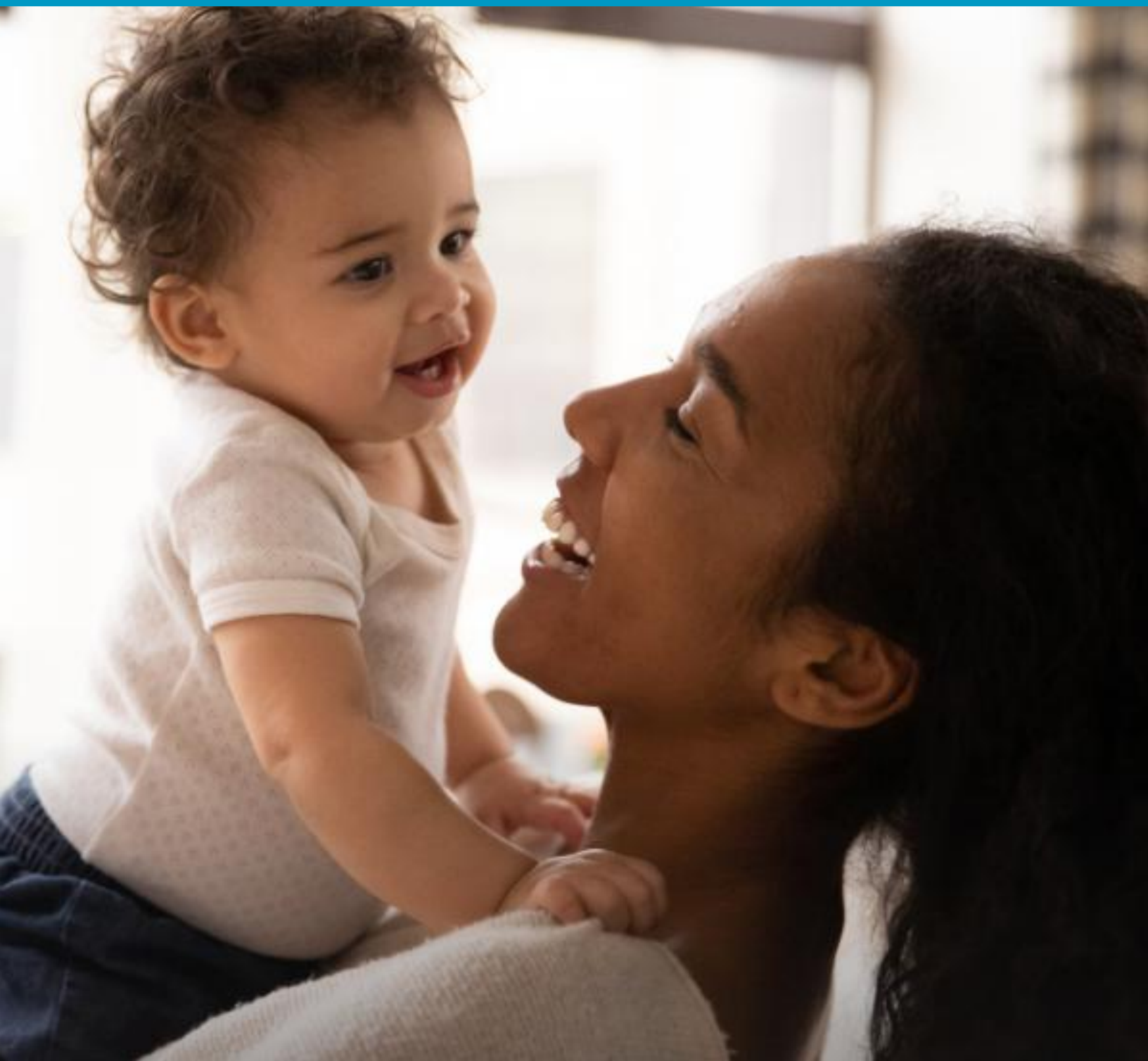
- Google Search
- Google Display
- YouTube
- Google Grant
- Microsoft Ads
- Microsoft Ads Grant
- Programmatic Display
- Contextual Targeting
- Remarketing
- Lookalikes
- Geo-Fencing
- Facebook
- Instagram
- Twitter Ads
- LinkedIn
- TikTok
- Pinterest
- CTV/OTT
- Digital Streaming
- Mobile Display
- Interactive HTML5
- Native Advertising
- Outstream
- Out of Home
- Audio Streaming
- SMS/MMS
- Print Publications
- Direct Mail
- Radio
- Direct Response Radio
- Television
- Direct Response Television

Media Plan Development, Monitoring, and Optimization

As a client of TrueSense, your strategists and team of media subject matter experts will develop a robust media plan that aligns with your budget and positions you to meet your goals and objectives.

While a media plan is established at the beginning of a project, media plans are never "complete," as performance is continuously optimized against business goals, campaign objectives, and audience behaviors.





B. Strategy and Approach

B1. Omni-channel Strategy Development: Outline the step-by-step process for developing an audience-led strategy from initial audience research and segmentation to channel selection and content planning.

The Future of Fundraising

Fundraising has fundamentally changed with the explosion of technologies over the past decade. Donors are now empowered in their day-to-day lives as consumers, and have become so expert in their use of devices and information that they expect to be able to call the shots. They are spoken to in ways they prefer, and they get what they want when they want it, delivered to their doorstep. This consumer trend will continue in the philanthropic environment, with donors expecting similarly well-designed experiences across the channels in which they interact.

To forge deeper, more meaningful connections with their constituents, future fundraisers will have to **more fully unlock the potential of data**. For that reason, nonprofits should expect their investments in technology to increase dramatically, as winners and losers will be determined based on the use of AI-powered solutions and insights, hyper-personalization, and a greater focus on constituent experience; all of which are only realized through enhanced technology and data.

Given the critical role of data enablement across the future marketing landscape, nonprofits should also plan for how they will navigate a growing array of privacy and transparency considerations as they become more complex and ever-present.

And that's not all. **The economics of fundraising have shifted** over the last three decades. Costs have risen across all aspects of fundraising while performance has softened. There are a number of reasons why:

- Heightened competition amongst charities for share of wallet.
- Saturation of channels.
- A more fractured focus across the charitable donor target audience.
- A shift across younger generations away from institutional philanthropy to a focus on giving to communities.

All these factors will force many nonprofits to reassess what healthy growth looks like. For most this will mean the pursuit of legacy goals must be abandoned in the face of these new fundraising economic realities.

Finally, **the role of generative AI will create a positive disruption enterprise-wide**. Many may think of generative AI and LLMs in terms of creative and messaging, and surely they will help creative professionals with iteration and productivity. But generative AI solutions will start to become ubiquitous in the working world. That type of omni-connected work experience is already within reach, with tools like Copilot, and should be something nonprofits begin to plan for today.

By understanding the current landscape, TrueSense is positioned to address the challenges and leverage the opportunities that arise. This sets the stage for our strategic approach, detailed in the following pages, and underscores the necessity of forward-thinking and adaptive strategies in today's market.



B1. Omni-channel Strategy Development: Outline the step-by-step process for developing an audience-led strategy from initial audience research and segmentation to channel selection and content planning.

The Opportunity

Tech and data requirements for the new donor experience; data privacy; rising costs; disruptive force of generative AI ...

While many of these factors are concerning or even alarming to nonprofit executives, they underscore the changing appetites, influences, and behaviors of U.S. consumers and, by proxy, U.S. donors. With change comes great opportunity for those able to successfully anticipate and react to how these factors will play out across fundraising.

While the legacy channel mix may shift and some of the considerations may require reframing, in the end, sound fundraising principles and a focus on donor experience will remain the most critical ingredients for long-term success for nonprofits.

We have delivered AI-powered models and insights for the better part of the last half decade and continue to further these capabilities to help our clients compete intelligently and relevantly in current and future economies. To future-proof ourselves and the nonprofits we serve, we made investments in our own tech stack and are committing to continue to do so to keep pace with the evolving marketplace.

We actively counsel nonprofits to build fundraising programs around the concept of long-term net revenue — and we are one of the few agencies to do so. Strategically, this means decreasing focus on individual touchpoints and instead focusing on an integrated view of longitudinal performance.

This promotes a greater understanding of investment breakeven, ROI, and, consequently, real “operating income” for nonprofits.

Our in-house digital operations and creative teams have been testing, using, and considering where and when generative AI solutions are appropriate in the work we do for our clients, both ethically and practically.



“

While the legacy channel mix may shift and some of the considerations may require reframing, in the end, sound fundraising principles and a focus on donor experience will remain the most critical ingredients to long-term success for nonprofits.

B1. Omnichannel Strategy Development: Outline the step-by-step process for developing an audience-led strategy from initial audience research and segmentation to channel selection and content planning.

Embracing the Age of Relevance

As we alluded to earlier, now more than ever before nonprofits need to see their constituents through the lens of their consumer experiences. This is more than just a marketing issue; there has been a far broader shift related to how consumers interact with their world at large.

Whether this is their first-time user experience with a mobile app or online experience, the out-of-box experience they have with their iPhone 15 Pro, or the recognition of their interests and past behaviors when they shop at a store, your donors are having daily experiences with other organizations that shape their brand loyalty and consumer behaviors. Nonprofits need to unlock how they also can assimilate and adopt these intentionally designed experiences to better relate to, and ultimately resonate with, donors.

Simply knowing this isn't enough. Many commercial companies can afford to invest the necessary resources to deliver these custom experiences.

However, that doesn't hold quite as true for most nonprofit organizations.

Nonprofits and/or their agencies must have the internal capacity to identify those constituents that have the greatest odds of being worthy of increased investment, in both resources and level of effort, to improve their experience in pursuit of better outcomes.

Marketers have long discussed moving from mass marketing (one-to-many) to targeted marketing (one-to-some) to personalized marketing (one-to-one).

While nonprofit fundraising may still be a long way from true one-to-one marketing, the age of relevance has put us firmly on that doorstep. Nonprofits must focus on the needs and expectations of their donors and adapt to their philanthropic priorities in order to continue to keep them engaged.



B1. Omni-channel Strategy Development: Outline the step-by-step process for developing an audience-led strategy from initial audience research and segmentation to channel selection and content planning.

How We Curate an Omnichannel Experience

Nonprofit executives and fundraising professionals alike acknowledge that silos, whether in business units, channels, or data, are major barriers to effective omnichannel communications. Conversely, they understand that removing silos is equally difficult because organizational change management is hard.

Omnichannel best practices require not just your agency partner but your organization itself to have a unified, singular view of the constituent.

“Omnichannel” should mean a consistent experience in all the places they visit. Therefore, a constituent’s experience with your brand within any channel should be related to an integrated strategy, one based on the total value that donor represents to your organization and not the individual programs or channels they exist in.

Instead, many nonprofits and agencies get caught creating silos: artificial lines of separation driven by other internal priorities or trends, like digital silos that often arise from a perceived uniqueness about what works for that specific channel.

When housed across teams or within an agency, it’s easy to adopt a channel-centric view that unintentionally excludes or conflicts with other channels. This leads to a disconnected and ineffective strategy which in turn sours the experience for donors.

To effectively implement omnichannel best practices like consistent experience, data sharing between channels, and hyper-personalization, nonprofits must build organizational structures that parallel the seamless and consistent experiences they aim to provide to their donors. Unintegrated teams, reporting, or processes can hinder omnichannel best practices.

Our journey toward being entirely omnichannel continues to evolve, and many initial steps have already been taken:

- Media mix models that align top-down investment strategies across channels.
- An integrated strategy practice inclusive of creative, analytics, and data-driven strategy professionals.
- A channel-agnostic campaign architecture and reporting framework.
- Tools like our Donor Health Index and Giving Potential Scores, which assess each constituent at the constituent level, unfettered by channel or program limitations.

To deliver this seamless experience to you, we’ve worked hard to match our team structure to the lived experience of donors in a business model we call Full-Circle Fundraising (see section J). Behavioral data leads to insights, and insights feed strategy, which in turn feed creative and deployment, ultimately leading to fresh donor behaviors and insights.

This continuous cycle creates a learning agenda for each nonprofit we serve.

B2. Channel Optimization Plans: For each channel, describe specific strategies for optimization and growth, including tools and technologies used for analysis and performance improvement.

An Initial Prescription

Without access to the entire data set from March of Dimes, we feel it would be risky of us to be overly prescriptive in what we recommend as optimizations to your fundraising programs.

If we are fortunate enough to partner with you, this is an area we would want to explore with you and your teams together, understanding your past journeys so as not to retread old paths, establish what is out of bounds for your organization, and co-create the strategic solutions aimed at course-correcting your program to drive toward your goals.

We are an audience-first fundraising agency, and that detailed data is not something we currently have to properly evaluate your efforts for surgical optimizations.

That said, we can see in the reports you shared the **telltale signs of some common ailments that many across the fundraising landscape also grapple with**, combined with what we know about the macro marketplace trends of rising marketing costs, diminishing audience size, softening prospect response, the struggle to identify donors who are ready for transformational giving opportunities, and the hyper-competitiveness for attention across the health sector of philanthropy.

We are tackling several of these macro trends head-on with a variety of data-driven approaches. Our media and giving science teams lean heavily on cutting-edge AI and machine learning predictive models, fueled by your organization's zero- and first-party data (ZPD and FPD), to combat **the aspects of fundraising that we can control**.

To address rapidly rising marketing costs, which are an inescapable reality for fundraisers today regardless of channel, we will share on the next several pages how our Giving Potential Scores (GPS) solution for cultivation will allow March of Dimes to combat rising marketing costs directly. Our solution gives you the ability to make investment decisions at the individual donor level, and we typically see as much as a 15% to 20% reduction in campaign costs at only a 1% to 2% reduction in campaign revenue, drastically improving the efficiency and ROI of those touchpoints without losing critical retention or top-line revenue generation.

Most nonprofit organizations today are making **the difficult decision between value versus volume with regard to the size of their active donor file**. Our predictive models can be tuned to prioritize response over value, or value over response, based on the goals March of Dimes sets out to pursue.

Every organization believes they have the right donors identified in their mid-level and major donor portfolios; however, we will share examples of how our AI-powered predictive modeling has identified where organizations are missing opportunities as well as misplacing their efforts on donors who are statistically unlikely to make transformational gifts.

Finally, we'll touch on how we take **a full-funnel approach to marketing** to ensure you can compete effectively for share of mind and wallet with your health sector peers.

Advanced Segmentation & Targeting



The unique characteristics of each constituent inform a score, enabling a surgical approach to segmentation and targeting, becoming the fuel for driving personalized, cost-effective experiences.

B2. Channel Optimization Plans: For each channel, describe specific strategies for optimization and growth, including tools and technologies used for analysis and performance improvement.

Reducing wasted expense with AI-powered campaign targeting

We have decades of experience improving donor-marketing campaigns by refining segmentation and targeting, and this will be of great importance for your fundraising program if we are fortunate enough to partner with you.

Our in-house advanced analytics team uses AI and Machine Learning to build the most powerful — and proven — data tool in today's donor marketing arena. We call it **GPS™**, short for **Giving Potential Scores**. This ensemble of models is broken into specific areas of focus:

GPS-Cultivate

Donor appeal and campaign solution with an eye toward LTV.

GPS-Sustainer

Identifies existing donors exhibiting sustainer likelihood.

GPS-Reactivate

Lapsed reactivation solution that consistently beats co-ops.

GPS-Legacy

Identifies the top planned giving and bequest candidates on file.

GPS-Mid/Major

Identifies donors primed for movement and/or tipping points.

Our advanced analytics team is incredibly proud of these solutions. We discuss why they **can be so powerful and effective for your program on the next few pages.**

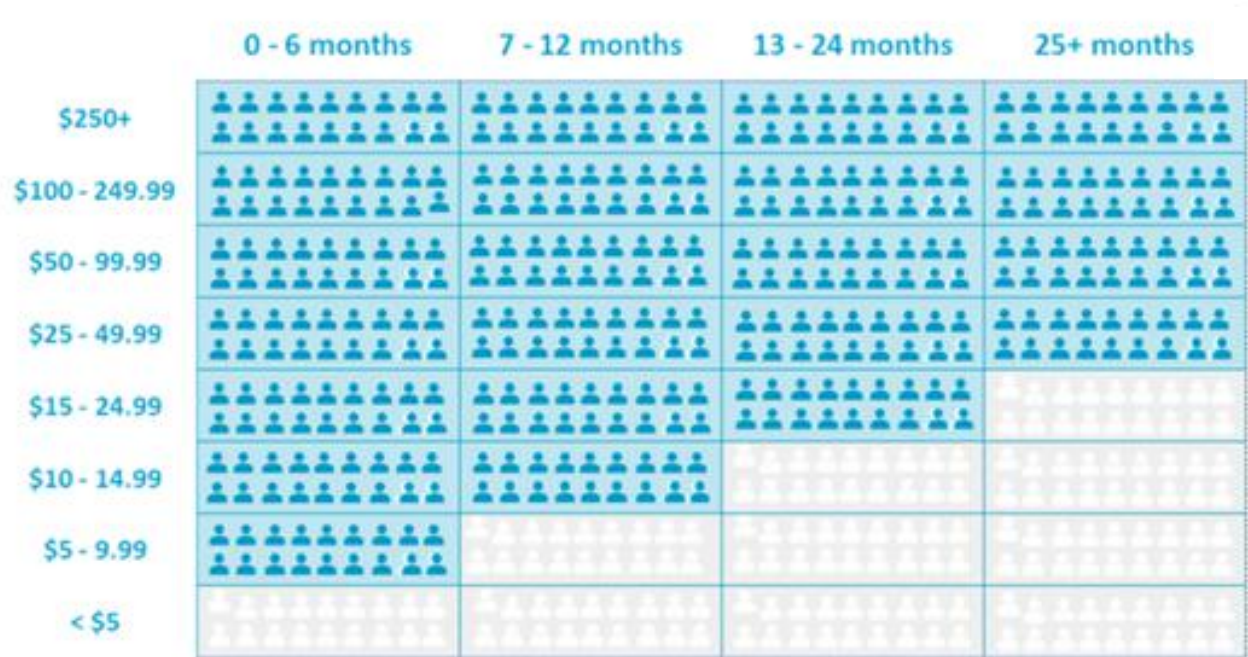
B2. Channel Optimization Plans: For each channel, describe specific strategies for optimization and growth, including tools and technologies used for analysis and performance improvement.

The Limitations of Traditional Targeting

Selection is based on the segment instead of the individual. Traditional targeting approaches group constituents by like RFM characteristics into segments, and these groupings are where inclusion and exclusion decisions are being made for campaigns.

The flaw of averages. Any targeting approach that is based on segment-level performance is essentially forcing you to make decisions based on the average performance of that segment.

Steering while looking in the rear view. Another weakness of traditional targeting is that it is backward-looking. While historical performance can be instructive, we want to know what a donor will do next.



SEGMENT LEVEL

Traditional targeting forces decisions to be made at the aggregate level, not the individual.



FLAW OF AVERAGES

Performance evaluation is based on the average of the entire segment, hiding both best and worst.



BACKWARD-LOOKING

Traditional targeting prioritizes what happened previously; it does not anticipate what's next.

B2. Channel Optimization Plans: For each channel, describe specific strategies for optimization and growth, including tools and technologies used for analysis and performance improvement.

Creating Value With Predictive AI

Individualized first-party data is a strategic advantage. Unlocking the power of your constituent’s giving behavior gives you the ability to begin to pursue that holy grail of marketing: personalized experience.

Precise constituent scoring. GPS allows you to consider dozens of factors, from giving momentum to size of donation, seasonality, and demographics. Dozens of performance-related variables are part of the consideration that results in constituent-level GPS scores for targeting.

Keeping your eyes on the road ahead. Using some of today’s most cutting-edge artificial intelligence and machine learning techniques creates a forward-looking estimation of constituent giving and annual value.



INDIVIDUALIZED

Considers dozens of distinct factors that reveal which constituent should or should not be targeted.



DISTINCT FACTORS

Evaluates and scores each constituent based on their own unique giving behaviors.



FORWARD-LOOKING

Consumes your data to fuel an AI-powered decision engine that predicts likely future value.

B2. Channel Optimization Plans: For each channel, describe specific strategies for optimization and growth, including tools and technologies used for analysis and performance improvement.

Demystifying Transformational Giving Patterns

Another way we would optimize your current fundraising program is by performing a diagnostic audit of your mid-level and major donor assignments with our GPS-Mid/Major Solution.

To give you a sense of how this would benefit you, consider this real example of anonymized nonprofit data, which was scored with GPS-Mid/Major. Those scores were grouped based on the nonprofit’s giving criteria for mid-level and major donors.

The groupings and **projected future annual value** can be seen below.

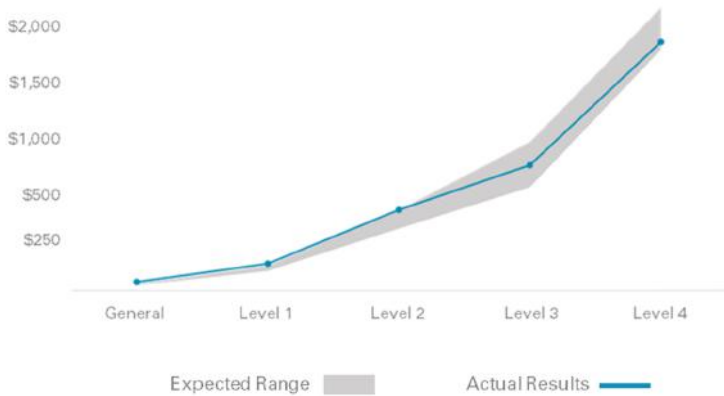
GPS Category	Projected Annual Revenue per Donor	% SLG \$5k+ or AV \$10,000
General	\$52	0.0%
Level 1	\$186	0.0%
Level 2	\$574	0.4%
Level 3	\$1,028	1.2%
Level 4	\$2,187	4.8%
Level 5	\$15,226	48.8%

In this case, the nonprofit began their mid-level at \$1,000 annual cumulative giving (Level 3) and began their major donor assignments at \$10,000 annual cumulative giving (Level 5). In the chart below, you can see the GPS score groupings by level; the projected range of annual value (upper- and lower-bound) of each group in the shaded region; and then their actual annual value results over the subsequent 12 months after being scored, represented by the blue line.

Suffice it to say the projections are remarkably accurate.

PROJECTED VERSUS ACTUAL ANNUAL VALUE

Creating Confidence in the Projections



B2. Channel Optimization Plans: For each channel, describe specific strategies for optimization and growth, including tools and technologies used for analysis and performance improvement.

Intelligently Realign Staff and Investment Levels

So what? How did this help them, and how could it help March of Dimes?

In the table below, you will see the donor counts for both our GPS levels, which we now know from the last page accurately predict future annual value with confidence, and the current program assignments for that nonprofit.

NONPROFIT ASSIGNMENT VERSUS GPS

Organization was overreaching in this case.

GPS Category	Organization "XYZ"	Donors
Level 5	Major (Portfolio)	53
Level 5	ML Program	4
Level 5		47
Level 4	Major (Portfolio)	239
Level 4	ML Program	67
Level 4		191
Level 3	Major (Portfolio)	404
Level 3	ML Program	783
Level 3		1,170
Level 2	Major (Portfolio)	210
Level 2	ML Program	1,072
Level 2		2,970
Level 1	Major (Portfolio)	66
Level 1	ML Program	1,040
Level 1		9,578
General	Major (Portfolio)	37
General	ML Program	1,056
General		305,347

A few things will stand out to you. The first is that GPS identified (in the green font) **more than 1,400 donors** who were not receiving mid-level or major donor treatment in this nonprofit’s current assignments, who statistically are likely to give \$1,000+, \$2,000+, and even \$15,000+ in the next 12 months. Next, GPS identified (in the red font) **nearly 3,500 donors** this nonprofit had assigned to mid-level and major donor programs who are statistically unlikely to give more than \$500 in the next 12 months.

THE IMPACT

Optimized identification and outcomes.

OPPORTUNITY LOST

1,408 donors worthy of Mid/Major stewardship (implied \$1000+ annual value) presently not receiving elevated communication.

EFFORT WASTED

3,481 donors who are statistically unlikely to make a transformational gift (<\$1,000 annual value) presently receiving Mid/Major stewardship.

B2. Channel Optimization Plans: For each channel, describe specific strategies for optimization and growth, including tools and technologies used for analysis and performance improvement.

Full-Funnel Media Optimization

When we think about optimization, we tend to think less about channel and more about audience.

Across all media, making the “next best dollar spent” consideration and optimization is often a highly quantitative process and one where we build in-house media mix models to help guide how we allocate your investments. Our media mix models give you a data-driven solution to allocate your budgetary dollars by channel and audience so that you have confidence in your next best dollar spent.

That said, there are some “North Star” strategic guidelines we adhere to, specific to each channel. Below is a brief overview of the tenets that underpin our approach to general channel optimization, taking into account that there are countless others specific to each audience subgroup and the objectives you might have for them.

DIRECT MAIL

Acquisition

- ☐ Single-gift donors target 24-month investment breakeven
- ☐ Recurring-gift donor target 30-month investment breakeven
- ☐ Use Optimal Ask model to identify/remove likely low-dollar donors from list sources
- ☐ Go Big! mindset in acquisition testing; avoid incrementality

Cultivation

- ☐ AI-powered predictive modeling for targeting to maximize ROI
- ☐ A testing/learning agenda with an expense focus
- ☐ Limited mail to online-only donors

Reactivation

- ☐ AI-powered predictive modeling for targeting, to target value and maximize ROI
- ☐ A testing/learning agenda with a generational focus

DIGITAL

Acquisition

- ☐ Full-funnel digital-first approach
- ☐ Single-gift donors target 24-month investment breakeven (critical to know CTA)
- ☐ Recurring-gift donor target 30-month investment breakeven

Cultivation

- ☐ Create unique trigger-based journey for new to file based on entry point and gift level
- ☐ Within eAppeals, deliver additional custom emails to donors with the highest GPS scores
- ☐ Limited mail to online-only donors

MID / MAJOR

Acquisition

- ☐ Initial gift incredibly predictive of Mid/Major likelihood; acquire with intention
- ☐ Digital is the stronger channel for high-value donor recruitment

Cultivation

- ☐ Donor Experience and Retention are more critical than Upgrading
- ☐ AI-powered predictive models to identify donors best suited for Mid/Major treatment
- ☐ Rebalance Major Donor caseloads; capacity does not equal intent
- ☐ Annual Value is the superior metric to pursue over individual gift amount

SUSTAINER

- ☐ Dedicated sustainer landing page/donation forms; lead with Sustainer Offer
- ☐ CTV, DRTV, and Digital need to be the priority channels for sustainer recruitment
- ☐ Use predictive modeling to convert existing donors

B3. Transition Success Stories: Provide detailed case studies of previous clients who successfully transitioned to an omni-channel approach, focusing on strategy, execution, and results.

Case Studies of Multichannel Effectiveness and Sustained Growth and Change

The proliferation of new communication channels has given rise to new behaviors in both shopping and giving. Consumers now amass information from online and offline sources, often starting their journey in one channel and finishing it in another.

As an example, a medical provider may send a bill through the postal mail with specific instructions on how to pay online and then follow up with a text message or email notification that a bill is ready.

The customer has several channels to respond to the same request: Please pay your bill.

The channel they end up using may represent their

preferred channel or perhaps just the most recent or convenient one. The lesson for charities is clear: More channels = more LTV.

Multichannel donors have greater value to charities, and the single-channel donor is going away. In a study of more than 46,000 shoppers, the Harvard Business Review found that the more channels a customer uses, the more valuable they are to the retailer.

The following section overviews two important case studies in our work. The first is a large health care brand; the second is a veteran-focused charity. In both instances, TrueSense developed multichannel effectiveness with sustained growth over time.



B3. Transition Success Stories: Provide detailed case studies of previous clients who successfully transitioned to an omni-channel approach, focusing on strategy, execution, and results.

A Journey From Single-Channel to Omnichannel Excellence

TrueSense was tasked with developing a robust and dynamic digital program with full multichannel integration for a national hospital program. While the direct mail program was fairly mature, the digital program lacked integration and intention. We quickly evaluated the current program and concluded that there were opportunities to quickly scale it through better digital integration. Over the next three years, TrueSense transitioned and grew their program from mostly single-channel to a robust integrated program.

YEAR ONE ACCOMPLISHMENTS

- Leveraged program efficiencies to build a sustainable and informative digital infrastructure.
- Implemented steady marcom that increased constituent engagement, giving, and conversion.
- Intentionally balanced campaigns for appropriate channel mix across the file.
- Expanded digital efforts into additional mediums to increase reach and awareness.
- Added digital campaigns that resonate in health care and support the program mission.

YEAR TWO ACCOMPLISHMENTS

- Introduced Trigger-Based Marketing, developing behavior-driven donor experiences.
- Leveraged opportunities to capture additional data for future customization.
- Implemented highly personalized, unique offers.
- Adjusted marketing calendar to lean into the best offers by audience and sunset underperformers.
- Introduced live optimization testing at scale.

YEAR THREE ACCOMPLISHMENTS

- Moved digital from a supporting channel to a leading channel, acquiring and cultivating its own donors.
- Drove digital performance while lifting direct mail.
- Introduced year-round evergreen digital acquisition efforts, driving giving at \$100+.
- Continually refined annual marcom to leverage the right offer to audience.
- Expanded Trigger-Based Marketing efforts.



+\$1.1M

YEAR 1: DIGITAL
PROGRAM REVENUE



+55%

YEAR 1: NEW
DIGITAL DONORS



+52%

YEAR 2: DIGITAL
CAMPAIGN GIFTS



+45%

YEAR 2: ACTIVE
DIGITAL \$1K DONORS



x2

YEAR 3: \$1K+ GIFTS
FROM DIGITAL
ADVERTISING



5

YEAR 3: NEW
TRIGGER-BASED
EMAIL SERIES

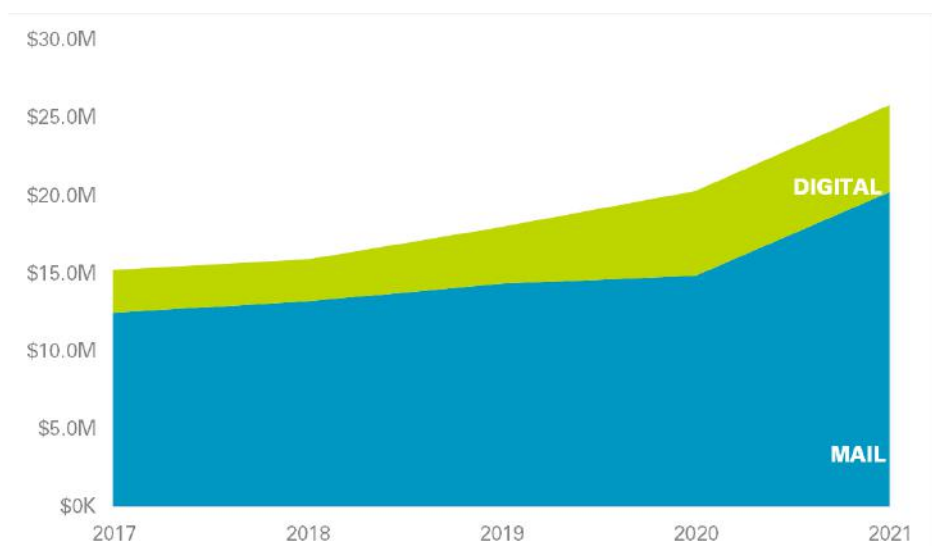
B3. Transition Success Stories: Provide detailed case studies of previous clients who successfully transitioned to an omni-channel approach, focusing on strategy, execution, and results.

The Outcome

After just months in market, the impact to their mature program was recognized. Over the following three fiscal years, the program continued to grow, generating record-breaking results. While it could be argued that active donor gains were partially influenced by the pandemic, the revenue impact of strategic changes in 2019 is clearly evidenced prior to the pandemic timeframe.

THREE-YEAR GROWTH: 2019, 2020, 2021

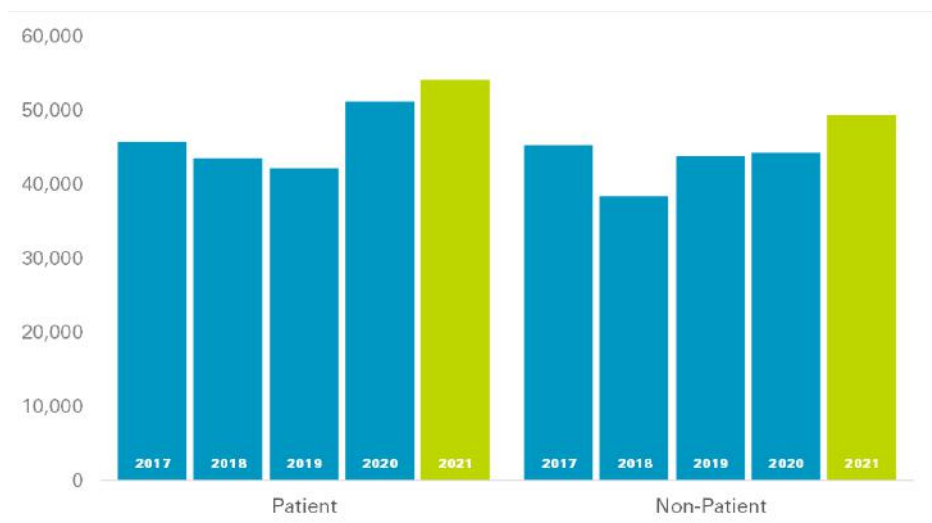
TOTAL PROGRAM | Gross Revenue, Giving Channel



Three year-growth from 2018–2021 represents an additional \$10 million: +63%.

Revenue increases were led by digital — up 111%. Direct mail, however, still contributes the most revenue growth with an additional \$7 million, or +53%.

TOTAL PROGRAM | Active Donors



The active donor file is boosted — up 27% in three years. This is accelerated through a combination of acquisition, retention, and reactivation.

Patient donors represent 10,000 additional active donors, while non-patient donors grow by 11,000.

Additional Question - Channel Synergy: Agencies need to explain how different channels will support and amplify each other, creating a cohesive narrative and donor experience. This ensures that all channels work in harmony rather than in isolation.

Multichannel Synergy

As illustrated in the following case study and based on our experience, a multichannel campaign is almost always greater than the sum of its parts. Multichannel campaigns not only activate response within the channel but link enhanced response across all channels being used. A donor receiving a letter may respond to an email with a gift. But without the letter, they would miss the prompt and the gift. This amplified giving is critical to multichannel success, as this example shows.

THE SITUATION

It was recommended in 2021 that K9s For Warriors initiate a Day of Giving called Spring Training. The creative concept was positioned around the idea that February is when catchers and hitters report for spring training, and it's also the time of year that K9s starts focusing on training puppies. With just one email and two social posts in the month of February, the campaign raised nearly \$5,000.

In FY22, the goal was to expand upon this effort digitally and include a few additional emails, a match campaign, and social. It was also recommended to adjust the creative platform, renaming the campaign "Battle Buddies Day." This is based on the concept that the Warrior and K9 are paired together for life as Battle Buddies, taking on everything together. This shift resonated with donors and resulted in an overall lift in results, raising nearly \$32K.

In direct mail, the focus was different, leveraging March as Brain Injury Awareness Month. This campaign fell short of projections, showing opportunity to evaluate the approach.



2024 DMFA AWARD FIRST PLACE WINNER

THE STRATEGY

Since Battle Buddies Day as a digital campaign resonated with donors in 2022, it was recommended to sunset the Brain Injury Awareness Month campaign and focus on Battle Buddies Day as a fully integrated multichannel campaign.

Additionally, it was recommended to expand efforts into other mediums such as SMS, LinkedIn, NextDoor, and Facebook Live.

THIS CAMPAIGN WON FIRST PLACE IN THE 2024 DMFA AWARDS IN THE MULTICHANNEL CATEGORY.

BATTLE BUDDIES DAY 2023

THE OUTCOME

This expansive campaign centered around a Day of Giving at the end of March 2023. As it had in previous years, the campaign leveraged a match challenge opportunity. This resulted in YOY results of:



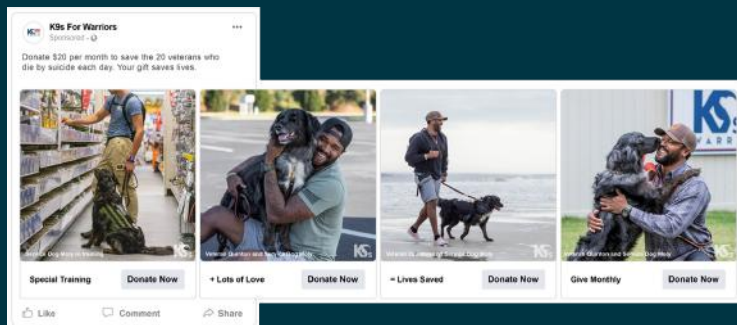
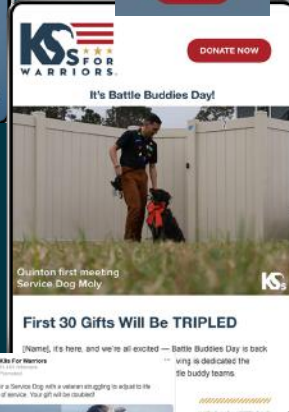
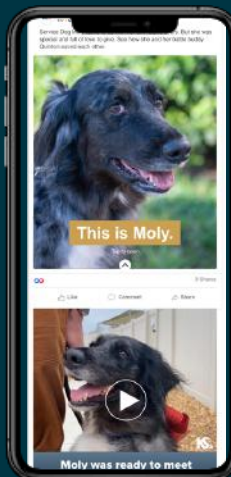
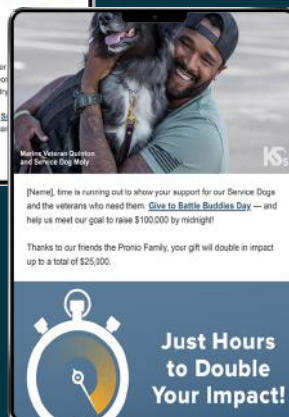
362%

Gross Revenue



105%

Gift Volume





Battle Buddies Day Channel Highlights

DIGITAL



\$103

Average Gift



48

SMS Gifts



24

New Sustainers

DIRECT MAIL



12%

Response Rate



\$9,058

Revenue per Thousand



15.2

Return on Investment

CONCLUSIONS

Leveraging the surround-sound impact of a fully integrated omnichannel campaign, Battle Buddies Day saw exceptional YOY growth from 2022 to 2023.

Three times the revenue was realized through a healthy digital average gift and exceptional revenue per thousand in direct mail.

Gifts were doubled through response to a variety of mediums, with SMS (a relatively new medium for K9s For Warriors at this time) generating 48 gifts.

B4. Channel Dependency Shift: Detail strategies for reducing dependency on any single marketing channel, instead distributing efforts across a balanced mix to optimize reach and engagement.

Overcoming Single-Channel Reliance Through a Multichannel Approach

To mitigate the risks associated with relying on a single channel, we advocate for a multichannel fundraising approach. This involves leveraging various platforms and methods to reach a broad audience of prospective and existing donors through direct mail and digital efforts. To ensure that programs are built with an omnichannel program in mind, our strategy focuses on balancing budget investment across tactics and implementing full-funnel marketing efforts across direct mail and digital channels.

At TrueSense, we partner with clients to co-create robust, multichannel programs even in situations where an organization has had a historical reliance on one or two channels for their fundraising efforts. One of the ways we do this is by creating custom digital and traditional media plans that balance the need to engage new audiences with converting warm and existing audiences.

To maximize reach, we tap into upper-funnel tactics — like programmatic display, paid social, and CTV advertising — to engage and inform new audiences about an organization's mission. This is complemented by an investment in lower-funnel advertising tactics — such as paid search advertising — where we often see donors convert.

This full-funnel approach ensures that there is not a single digital tactic expected to carry a full program's success. Instead, we meet our target donor audience where they are with the messages appropriate to their affinity to an organization. Not only is our approach encompassing multiple channels, but our ongoing optimization allows us to maximize the potential profits and engagement across each platform.

Beyond full-funnel advertising campaigns, we work closely with our clients to ensure proper investment across digital, direct mail, and telemarketing efforts to create a well-balanced omnichannel program. This includes balancing budget investment across the three channels while ensuring each channel is optimized and efficient.

By distributing cultivation and acquisition efforts across a balanced mix of marketing channels, we can reach a wider audience, engage supporters more effectively, and reduce the risks associated with overreliance on a single channel. The cohesion created in an omnichannel approach allows for organizations to move from single-channel dependency to a balanced, multichannel program that meets prospective and existing donors where they are.





B5. Regrowth and Retention Strategy: Explain your approach to addressing and reversing the trend of a depleting donor file, including tactics for donor re-engagement, acquisition, and retention to foster year-over-year growth.

The Pursuit of Future-Proofing

The present-day fundraising market conditions require a more financially rigorous mindset than ever before when seeking the right strategies and tactics to hold back the tide of a diminishing active donor file. Yet, the variety of donor appetites that lay just below the surface of the generational shift demands a more creative touch.

For these reasons, **we like to think of ourselves as having the brain of a consultancy but the heart of an agency.**

We focus on the very real fiscal considerations required for healthy program growth as well as the creative innovation necessary to deliver a sense of belonging to your donors. Belonging is one of humanity's most basic needs: the feeling of being happy or comfortable as part of a group. Over the next few pages, we will share examples of how we have delivered the exact type of healthy growth and declining donor file reversal you seek through intentional acquisition, high-value reactivation, and innovative digital outreach, and how that omnichannel approach helped foster giving habits that have found a more permanent place in the donors' lives.

B5. Regrowth and Retention Strategy: Explain your approach to addressing and reversing the trend of a depleting donor file, including tactics for donor re-engagement, acquisition, and retention to foster year-over-year growth.

Case Study: Fostering Growth in Your Direct Mail Program

When we began working with a substantial health care nonprofit with a similar file size and fundraising goals as March of Dimes, their direct mail active donor file was in decline.

Contributing factors included:

- A notepad and labels premium acquisition control bringing on low-value donors with lower retention rates.
- A premium-driven cultivation creative approach with a rigorous cadence. The organization's direct mail cultivation program included an appeals program only, and all 0–24 month \$10+ donors were mailed 24 appeals a year (two per month).

One of the first changes we implemented was to create a traditional renewal series apart from the current appeals program.

Zero- to 24-month \$10+ donors would now receive a scaled-back appeal cadence of only 17 appeals annually and a nine-effort renewal series beginning in January.

Donors were kept in all appeal mailings but removed from the renewal series starting with the second effort when any renewal or appeal gift was received.

This strategic change created two separate programs with varied creative and offer messaging aimed at increasing overall revenue.

Following the creation of the renewal series, we saw many impactful and positive changes over the course of the next year.

- Combined appeal and renewal response rates increased 20% and ROI increased 66%.
- 0–24 month \$10+ donor average gifts increased \$5 and the \$/M for this cohort increased 10%.
- The opportunity arose to expand our audience-first approach through segmentation in house file mailings to renewed and non-renewed donor cohorts.
- Our initial findings following the first year showed that renewed donors (those who have given to a renewal effort) showed a 115% increase in response rate and 78% higher \$/M when compared to donors who were not renewal responsive.
- Creating two programs with two sets of unique URLs created over \$100K in additional online revenue from this direct mail audience, speaking to positive omnichannel impacts.



Separating the renewals and appeals program and adding digital response options to direct mail saw response rates jump by 20% and ROI increase by 66% in the first year.

B5. Regrowth and Retention Strategy: Explain your approach to addressing and reversing the trend of a depleting donor file, including tactics for donor re-engagement, acquisition, and retention to foster year-over-year growth.

Acquisition and Lapsed Reinstatement

Additionally, the organization's new donor acquisition and lapsed reinstatement program heavily relied on the use of expensive upfront premiums — primarily a package that included a notepad, a set of personalized label sheets, and bookmarks.

In addition to those premium offerings, there were two versions based on gender using flower creative for women and car creative for men.

To achieve those audience segmentations, all data was also gender optimized, further contributing to the high program cost.

Their direct mail acquisition and lapsed reinstatement programs were being managed in a churn-and-burn style where mail quantities were aggressively high to reach print economies of scale. While this was providing strong upfront response rates in our acquisition program, it came at the cost of long-term value and lagging donor retention for the house file at large.

The high quantities and upfront premiums were bringing on many new donors who were simply falling off the file before they could break even — lifting upfront performance while sacrificing value in the long run.

We knew this type of shift would not happen overnight but rather would require long-view testing grids, regular review of multiple performance metrics for the next year, and patience!

We approached this challenge strategically by recognizing that our goals included more than just new direct mail test packages or simply testing removing the upfront premium. Our campaign test and implementation plans focused on a few key areas.

- Updating and testing entirely new direct mail creative that excluded the upfront premiums but included more mission-focused messaging to bring on more valuable long-term donors at a lower cost.
- Implementing more strategic list selects and audience segmentation tactics to accompany all new creative.
- Revising the subsequent house file solicitation programs, cadence, and mail calendar to re-solicit these more valuable donors more effectively once they joined.

We tested many different new creative packages and messaging in their acquisition and lapsed reinstatement programs over the course of a year and ultimately identified a package focused on advocacy, health equity, and accessibility to care for all, which became our new control package.



High mail quantities and costly upfront premiums were bringing on many new donors with high drop-off rates and negative ROI.

B5. Regrowth and Retention Strategy: Explain your approach to addressing and reversing the trend of a depleting donor file, including tactics for donor re-engagement, acquisition, and retention to foster year-over-year growth.

Improved File Health

Over the course of the next year, we monitored changes in all file health metrics to determine the efficacy of our new strategies beyond upfront acquisition performance.

Yes, we were bringing on fewer new and reactivated donors overall, but were the donors we were bringing on stronger and more valuable to the program at large?

1. Total annual revenue for the direct mail program increased by 3%; the program was making more revenue from fewer donors.
2. Total House file response rates increased 10% and ROI increased 28%.
3. 0–24 month direct mail donor decline receded from a 36% decline annually to an 18% decline.
4. \$5 improvement in total average gift for all house file programs.
5. \$250+ donor cohort saw a 143% increase in overall house file revenue, a \$92 jump in average gift, and a 71% lift in ROI — all while maintaining costs.



B6. Leading Organizational Change: Describe your experience and methodology in guiding nonprofit organizations through significant marketing and fundraising transitions, highlighting your role in strategic planning, execution, and achieving sustainable growth.

Leading Change: Our Experience

Over TrueSense Marketing's long history, we have helped clients implement needed changes as they pivot to the realities of an ever-changing world. Below we have included example areas where we have successfully partnered with clients to solve a new challenge or navigate complex transformations:

- **Fundraising Technology Implementation:** We've successfully partnered with numerous organizations as they navigated the process of implementing new customer relationship management (CRM) and email service provider (ESP) systems.
- **Brandraising:** We understand the importance of aligning an organization's brand identity with its fundraising efforts. Combining these important areas into "brandraising" helps to ensure cohesive messaging and visual elements. The result is a stronger, more meaningful connections with donors.
- **Strengths-Based Messaging:** Our team excels at helping organizations position problem-focused narratives in ways that highlight their unique strengths and impact. This is a frequent conference topic our team teaches and speaks about at the industry's leading gatherings.
- **Digital Accessibility:** We've pioneered digital accessibility in fundraising to ensure that all donors, regardless of ability, can easily engage with and contribute to a cause. Accessibility is another growing area of expertise that our team teaches regularly and a change our team has led numerous clients through.
- **Hispanic Marketing:** As demographic trends unfold, TrueSense is leading clients through the shift to Spanish-language fundraising and donor contact.
- **Audience Modeling:** We help organizations move beyond traditional recency, frequency, and monetary (RFM) segmentation to leverage the power of machine learning. This change often requires changes in how the organization has understood the behavior of its donors.
- **Launching Multichannel Fundraising:** Our agency has a proven track record of helping organizations expand from a single channel, such as direct mail, to a diversified, multichannel approach. We develop integrated strategies that engage donors across digital, social, and traditional channels.
- **Launching Digital Fundraising:** For nonprofits new to digital fundraising, we provide the guidance and expertise needed to build a strong foundation. From website optimization to online campaign development, we help organizations establish a powerful digital presence.
- **Embracing new media opportunities:** We stay at the forefront of emerging media trends, such as connected TV (CTV), to help nonprofits reach donors in innovative ways. Our team crafts compelling campaigns that leverage these cutting-edge platforms for maximum impact.

In each of the areas above, clients came to TrueSense with a vision for greater reach, impact, and effectiveness. Whether a technology shift, a pivot to new markets, or the exploration of new channels, TrueSense guides our clients through significant marketing and fundraising transitions.

[More details on our proven methodology for leading organizational change can be found in section E1 of our response.](#)

Community and Advocacy: Strategies to leverage community engagement and advocacy, particularly for younger audiences, should be outlined to foster deeper connections with the mission. This can enhance donor loyalty and increase community involvement.

Community and Advocacy

Policy and advocacy are key pillars of your work, and we would be thrilled to partner with March of Dimes to make an impact for all moms and their babies. Community spirit is a popular theme in fundraising, but it is also a valuable tool for audiences across all ages and channels to help promote engagement and connection to your mission.

Giving our donors an opportunity to propel change allows us to move our relationships with them far beyond the transactional. Omnichannel strategies can include leveraging **social media to create interactive campaigns** using challenges and shareable content to spread the word about key policy priorities; the use of **advanced modeling for outreach** to volunteers to get involved in different ways across the organization; **leveraging peer-to-peer audiences** in mobile campaigns and advocacy-specific outreach; **providing our direct mail donors with ways to get involved** by signing petitions or reaching out to local policymakers; and **continually educating** the entire direct response March of Dimes community to maintain engagement.

We have valuable experience successfully infusing advocacy messaging throughout omnichannel programs, specifically for a large health care organization promoting health equity, and we see this as a valuable opportunity to diversify and elevate your program!





C. Measurement and Reporting

C1. KPIs and Metrics: Define the KPIs for each channel and the overall campaign, explaining how they align with March of Dimes' goals and how they will be measured.



Measurement at Each Step Along The Way

The objectives you outline in your request for proposal are clear, and there are dozens of metrics that will have to be considered on an ongoing basis to effectively pursue them. As we cover in the section that addresses your inquiry about **the technology and tools we use to provide reporting**, we have exhaustive reporting for all media channels that we provide to you, to effectively monitor and react to results.

There are, however, a few metrics we believe are paramount to your future success. As an example, you have an objective of reversing the trajectory of your active donor file. An overly simplistic answer to the measurement around that objective might be acquisition response rate and average gift. You also have an objective around sustainability. To properly gauge if your acquisition and reactivation investments, regardless of channel, are putting you on a path towards sustainability requires other considerations, primary among them would be your risk tolerance (how soon you need to recoup your investment to acquire) and when you need to realize true long-term net revenue (the operating income needed to fund the critical programs and services that you deliver).

Let's unpack this a bit on the next few pages as we discuss those metrics we think matter most for you.

Focusing on metrics that matter

An industry struggles to adjust to increased costs of fundraising, shrinking donor files, shifting generational interests, and media channel proliferation.

C1. KPIs and Metrics: Define the KPIs for each channel and the overall campaign, explaining how they align with March of Dimes' goals and how they will be measured.

New Perspectives on Measurement

A change in thinking for the nonprofit industry

To begin we should set the stage.

All measurements have trade-offs, and there is no singular metric that can completely capture the multifaceted nature of a nonprofit organization's objectives given that each organization has differing resources and opportunities and ultimately pursues their objectives in a unique fashion.

With that said, we have seen a number of organizations move through a process to transform how they measure success. The key factor in selecting the right measure of success is creating clarity for the strategic achievement of your goals. For example, it does no good to measure the growth of your active donor file if your goal is anything other than simply counting donors.

What we have counseled nonprofits to consider, and what most of the organizations we serve have done, **is to move away from gross revenue and donor file size** as the primary measurements of success alone.

Those metrics still matter but are lessened in importance in favor of long-term net revenue and identification of future high-value donors (like major and legacy gift likely contributors).

When you boil all the metrics down, what truly matters is long-term net revenue and the chance of building a relationship with a donor that can make a transformational gift justifying a nonprofit's investment of their limited expense dollars, as well as human capital, into activities which will future-proof their program.

C1. KPIs and Metrics: Define the KPIs for each channel and the overall campaign, explaining how they align with March of Dimes' goals and how they will be measured.

Why a focus on long-term net revenue?

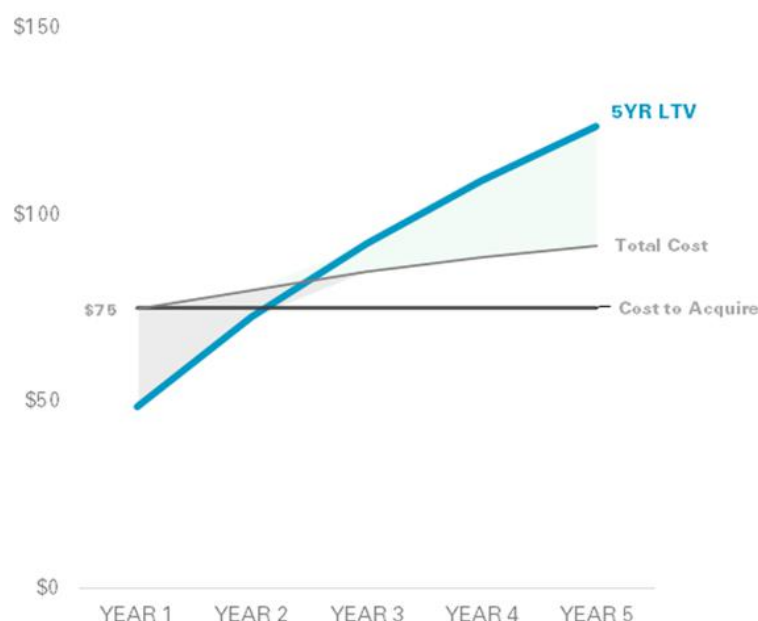
Avoiding churn-and-burn

We have been counseling the nonprofits we serve since 2017 to look beyond gross revenue as a meaningful measurement and to consider long-term net revenue as the superior metric for determining sustainable financial success.

Why the shift?

In terms of long-term net revenue, we want to know that each constituent on your file deserves your initial investment to acquire them as well as the ongoing cultivation and stewardship investments, relative to initial giving level, channel of origin, year acquired, and post-conversion behaviors.

To demonstrate what this concept looks like, we have provided a simplified example of this type of thinking, where we have a **\$75 cost to acquire** a donor that gave an **initial gift of \$50**.



When Investments Pay Back

There are three key metrics baked into the long-term net revenue calculation. Above we can observe the initial **cost-to-acquire** line and the **ongoing cost to support** this donor over time inclusive of cultivation, stewardship, milestone, and recapture expenses in the **total cost** line.

Plotted against these expense lines we can observe the blue line representing this **donor's five-year long-term value** based on their transactional giving over time.

What you will note is that while this donor likely showed up as "net positive" in individual cultivation campaigns they were targeted in fairly early on, the reality is that, in absolute terms, this donor does not begin to produce true long-term net (**the total revenue surpassing the total cost invested in them**) until the third year they are on the file.

Our industry long has misunderstood this and only recently began to realize the pursuit of gross revenue, not long-term net, was a primary cause for churn-and-burn program performance.



Rowing harder doesn't help if the boat is headed in the wrong direction.

Kenichi Ohmae
The Mind of the Strategist

C1. KPIs and Metrics: Define the KPIs for each channel and the overall campaign, explaining how they align with March of Dimes' goals and how they will be measured.

Pipeline myth-busting

The real story of upgrading

We combine our focus on long-term net revenue with the concept that pipeline movement needs to be a donor-centric, conditions-based activity instead of a one-size-fits-all approach. This thinking derives from several agency-wide analyses we have performed in the last few years to better understand mid- and major-donor giving patterns.

Many organizations envision a scenario where they acquire donors for their program and then systematically upgrade them step by step up the giving pyramid, moving them from low- or small-sum donations up to mid-level and beyond.

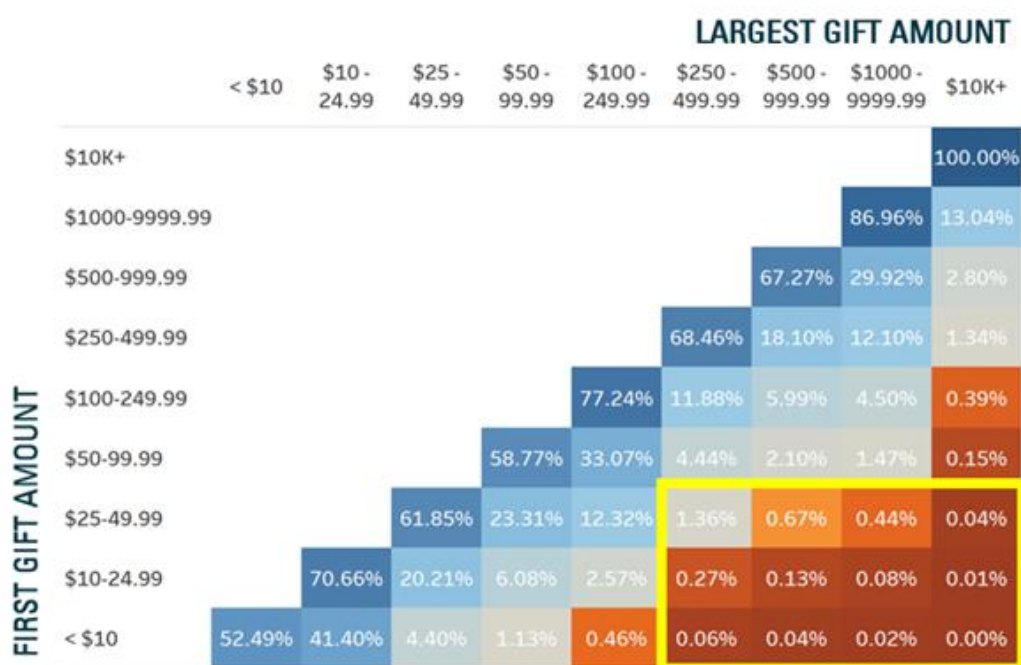
The data tells a far different story when interrogated properly.

What we observe is that for each first-gift amount (which represents the initial gift a donor made to an acquisition effort online, offline, or to an event), even after 10 years of giving to an organization very few ever escape the original gift level where they entered.

We also know from our own as well as publicly available industry data that **it takes an average of seven to eight years for donors acquired below \$100 to migrate above \$1,000.**

These two data points are the fundamental tenets of our mid-level programs (yes, plural) approach. We use advanced analytics to help nonprofit organizations focus on identification first, separating donor audiences into **fast-track and slow-track paths**, each with their own objectives and strategies for success.

The Data Reality



EVEN SPANNING OVER A DECADE OF TIME
MOST DONORS DON'T UPGRADE GIFT AMOUNTS BY MUCH, IF AT ALL

C1. KPIs and Metrics: Define the KPIs for each channel and the overall campaign, explaining how they align with March of Dimes’ goals and how they will be measured.

Brand Trust

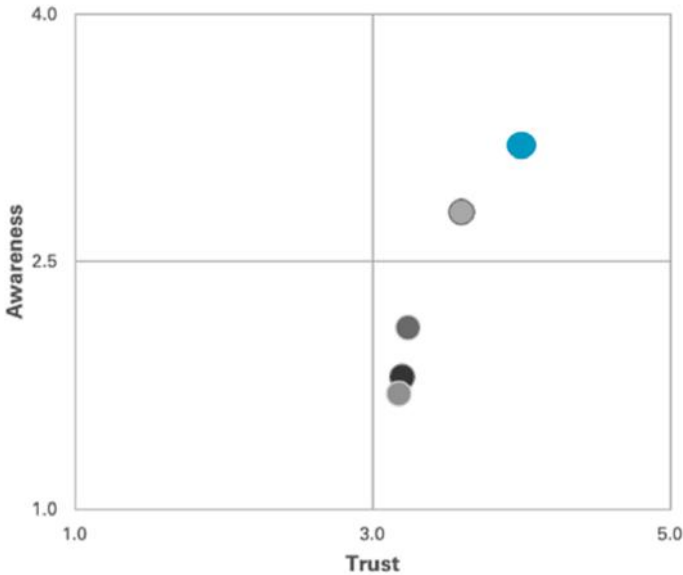
Impacting share of wallet

Brand trust is the amount of respect and loyalty your constituents have for your brand or how strongly they believe you can deliver on the promises of your mission. It is a public perception often shaped by a mixture of first-person experiences and marketing communications.

We have an in-house Giving Science team that includes a staff of primary researchers. This enables us to perform national primary research studies for the clients we serve to evaluate sentiments and perceptions across prospect and existing donors.

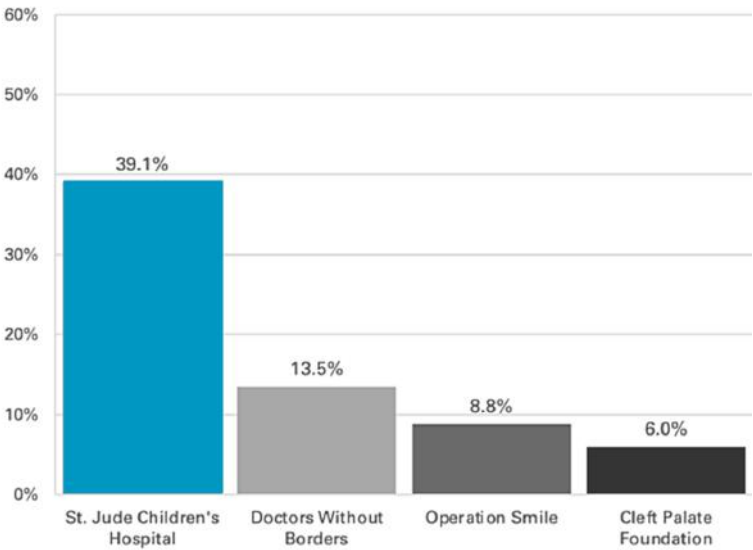
For the nonprofits we serve, we have repeatedly demonstrated through analysis how brand trust and awareness correlates with share of wallet **and, for that reason, brand trust is a metric we believe more nonprofits need to track**, as it impacts nearly every aspect of their fundraising programs.

Trust & Awareness



ORGANIZATION	TRUST	AWARENESS
St. Jude Children’s Hospital	4.0	3.2
Doctors Without Borders	3.6	2.8
Operation Smile	3.2	2.1
Cleft Palate Foundation	3.2	1.8
Smile Train	3.2	1.7

Share of Wallet



“

A brand is simply trust.

Steve Jobs
Inventor, Designer, Entrepreneur

Additional Question - Sustainability: Agencies are asked to consider the long-term sustainability of their strategies and how these efforts can continue to yield results beyond the immediate three-year timeframe. This focus on sustainability will help ensure that the organization remains resilient and adaptable to future challenges.

Looking Outwards to See Within

Financial growth and sustainability begin with an empirical, reality-based way to forecast future years' performance. While no tool or process can ever fully account for all future circumstances and market conditions, too often we have seen nonprofit leadership teams, nonprofit boards, and even other consulting agencies apply magical thinking to financial forecasts. We don't **hope**, we **plan**.

We would work with you to create a five-year forecast based on the investment and expected performance in the first year of our partnership and assumed budgets (that may be refined over time) for years two through five. These outward-looking budgets would establish the investment levels that we might realistically expect for future years so that you can see whether your decisions of today are helping in the short-term but hurting in the long-term, or if your planned investments and associated fundraising performance are building toward the future you want to realize at March of Dimes.

We'll expand a bit on the tools and processes we would use with you over the next several pages.



Additional Question - Sustainability: Agencies are asked to consider the long-term sustainability of their strategies and how these efforts can continue to yield results beyond the immediate three-year timeframe. This focus on sustainability will help ensure that the organization remains resilient and adaptable to future challenges.

A Reliable Real-World Edge to Revenue Forecasting

Often, forecasting follows a self-reinforcing cycle of looking at the last year to inform the next year. That pattern can contribute to inaccurate projections for a wide range of reasons and place nonprofits in fiscal peril.

We believe that revenue forecasting **should be accurate and comprehensive but flexible enough to inform a range of critical business decisions** including investment and input costs, the expected return on those investments and when it will occur, the impact new strategies will have on the program, consideration of external factors, and more.

Born from that stated need, **the TrueCast scenario engine was developed** to support planning and assessing new investment opportunities, thus ensuring the sustainability of your fundraising program into the future.

TrueCast™ Scenario Engine

Bringing your historical program data together with new innovations, strategies, and investment levels to project the future horizons of your fundraising program.



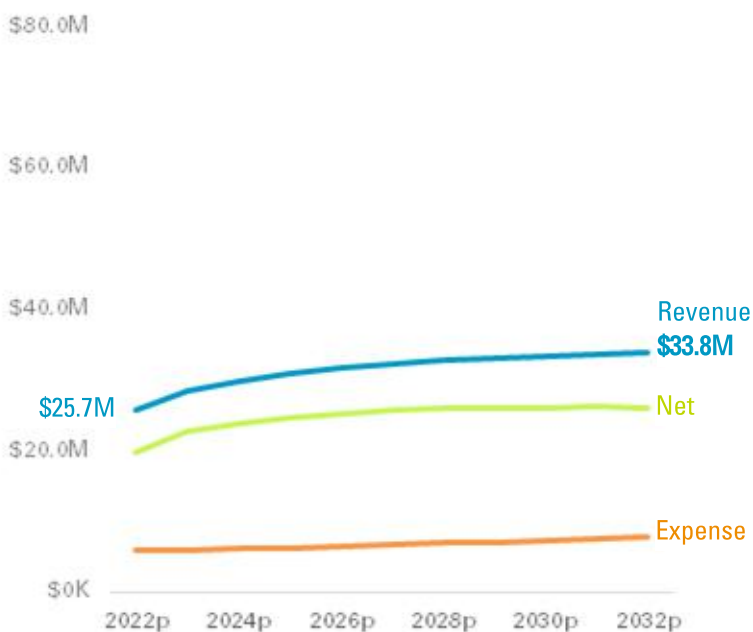
Data embedded in every consideration, decision, and process

BASELINE TODAY

The trajectory of this **sample organization** has experienced modest revenue growth every year over the last three years. If we took the FY2022 budget and performance as status quo for future years, this scenario would be expected.

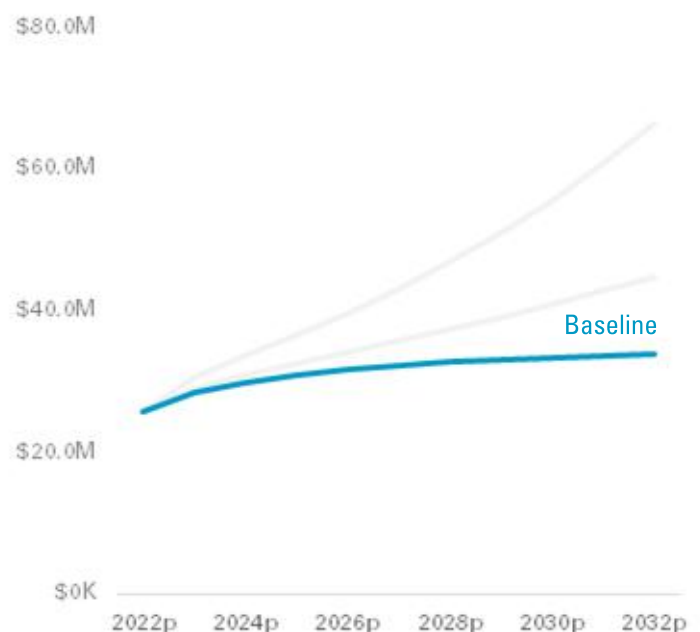
FINANCIAL VIEW

An accounting view of this scenario



COMPARISON VIEW

How does this plan compare to the alternates?



HIGH-VALUE DONOR VIEW

The resulting high-value audience size by 2032p

MLD	2032p	MLD - TOTAL
MLD - LOYALTY	1,514	33,231
MLD - PREDICT	31,717	+

MAJOR	2032p	MG - TOTAL
MG - SLOW	11,400	15,277
MG - FAST	3,095	+
UNASSIGNED	722	

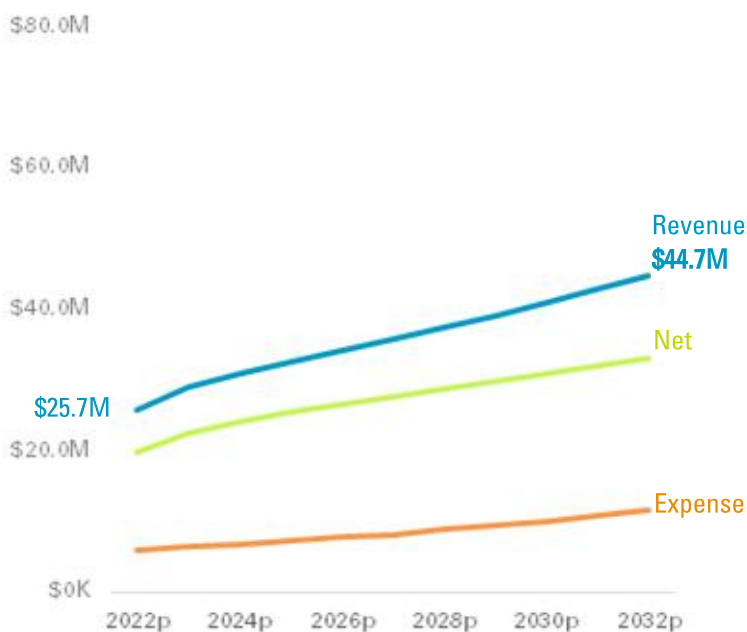
The ability to take data to the next logical step with TrueCast scenarios

ENHANCE

When layering in assumptions based on new creative concepts, cross-channel triggers, data enrichment, and technology advantages atop the **sample organization's** FY2022 performance, a new expectation is revealed for future years.

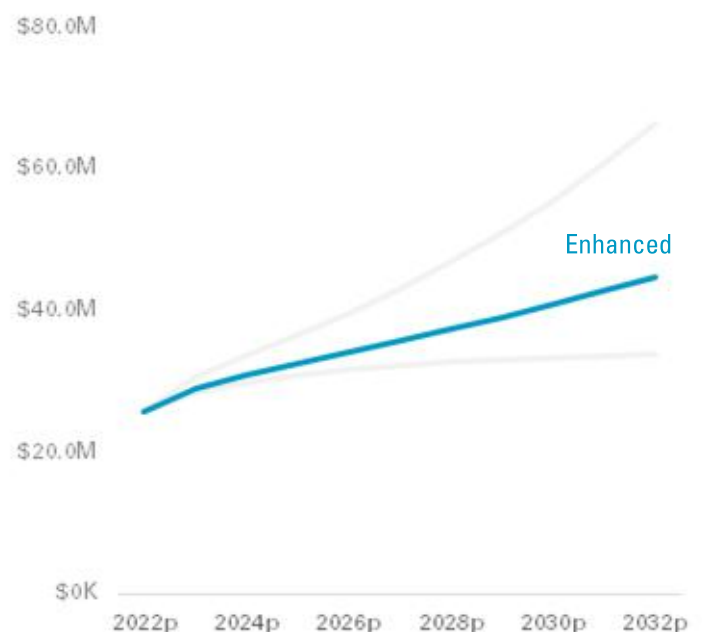
FINANCIAL VIEW

An accounting view of this scenario



COMPARISON VIEW

How does this plan compare to the alternates?



HIGH-VALUE DONOR VIEW

The resulting high-value audience size by 2032p compared to baseline scenario

MLD	2032p
MLD - LOYALTY	1,683
MLD - PREDICT	35,236

MLD - TOTAL

36,919
+ 3,688

MAJOR

	2032p
MG -SLOW	12,732
MG - FAST	3,439
UNASSIGNED	802

MG - TOTAL

16,972
+ 1,695

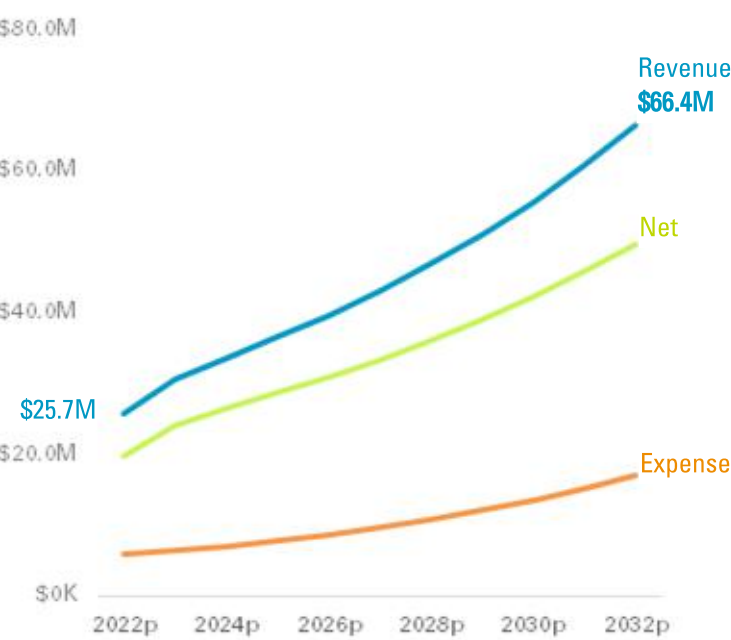
Casting a vision based on being able to see the results of a big “What if?”

ACCELERATE

Finally, we can see the full potential of the program when assumptions around significant increases to digital investment are factored in along with the elements in the prior Enhance scenario.

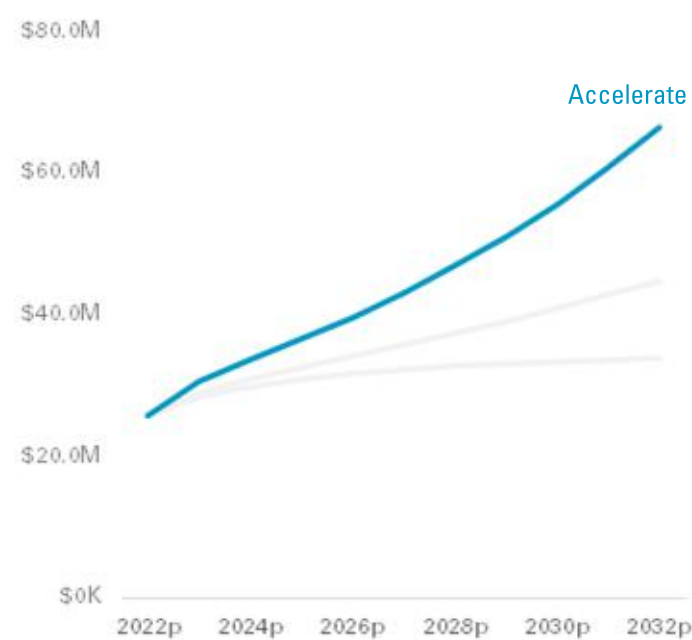
FINANCIAL VIEW

An accounting view of this scenario



COMPARISON VIEW

How does this plan compare to the alternates?



HIGH-VALUE DONOR VIEW

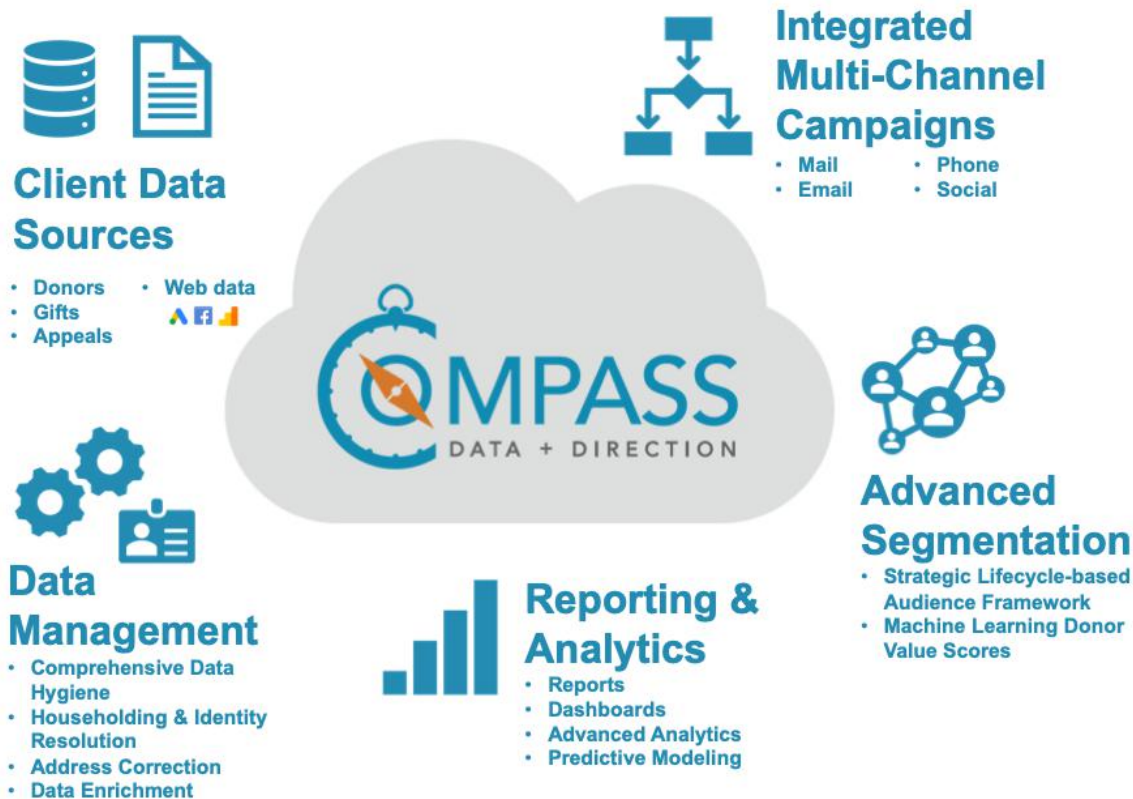
The resulting high-value audience size by 2032p compared to baseline scenario

MLD		MLD - TOTAL	MAJOR		MG - TOTAL
	2032p			2032p	
MLD - LOYALTY	1,979	43,413 + 10,182	MG -SLOW	14,972	19,958 + 4,681
MLD - PREDICT	41,435		MG - FAST	4,043	
			UNASSIGNED	943	

C2. Analytical Tools and Reports: List the tools and software the agency uses for monitoring campaign performance, along with sample report formats and how they inform strategy adjustments.

Unlock Greater Value With Our Data-Driven Operating Model

COMPASS is our proprietary, TrueSense-developed, omnichannel data ecosystem that enables the integration of your constituent contact and preference data, transaction history, communication business rules, promotion history, recurring gift commitments, media and response channels, and so much more.



Why We Built COMPASS

We strongly believe keeping pace with the leading edge of technology is a top priority. We believe that to ensure we provide the highest level of service to the nonprofits we partner with, investments in technology infrastructure and advanced analytics must be regularly made to address the growing challenge of our data-rich, but insights-poor, rapidly changing fundraising landscape.

In our pursuit of creative innovations, we recognize **it all begins with data and extracting value from it**. This requires cloud storage and processing capacity, a mastery of zero- and first-party data housed in an omnichannel environment, integration, and expertise with predictive AI to unlock the hidden value of data to propel future results forward.

COMPASS addresses all of these critical capabilities.

C2. Analytical Tools and Reports: List the tools and software the agency uses for monitoring campaign performance, along with sample report formats and how they inform strategy adjustments.

Insights. Measurements. Reporting.

Our proprietary data and insights platform, **COMPASS**, is built on a combination of best-in-class solutions:



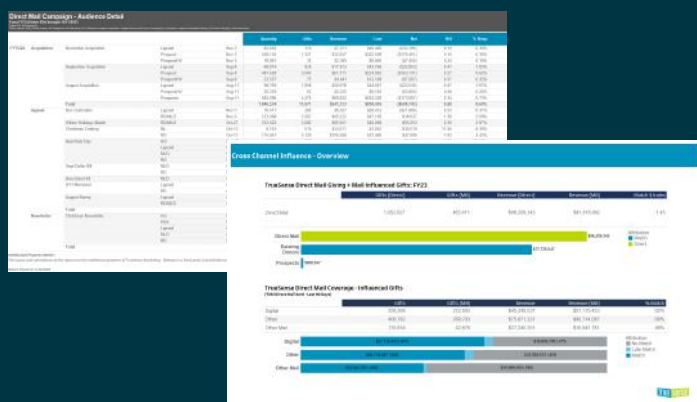
Relying on the speed and agility of Tableau, powered by our Snowflake data warehouse, you gain access to an incredible suite of standardized and custom views to track program performance.

Now, receiving tailored insights to meet your needs is only a few clicks, not days, away.

Powerful Standardized Reporting Capabilities

A few examples from the massive suite of diagnostic views you gain access to with us.

Campaign Reporting and Budget Progress



Multichannel Campaign & Budget Progress

Detailed campaign reporting metrics and performance vs. budget, across all your channels.

Cross-Channel Influence

It is more important than ever to understand how investment in one channel impacts revenue in another. You will have the ability to evaluate giving across all channels from donors in campaigns.

Donor Health Index



Cross-Channel Influence

Donor Health Index (DHI)

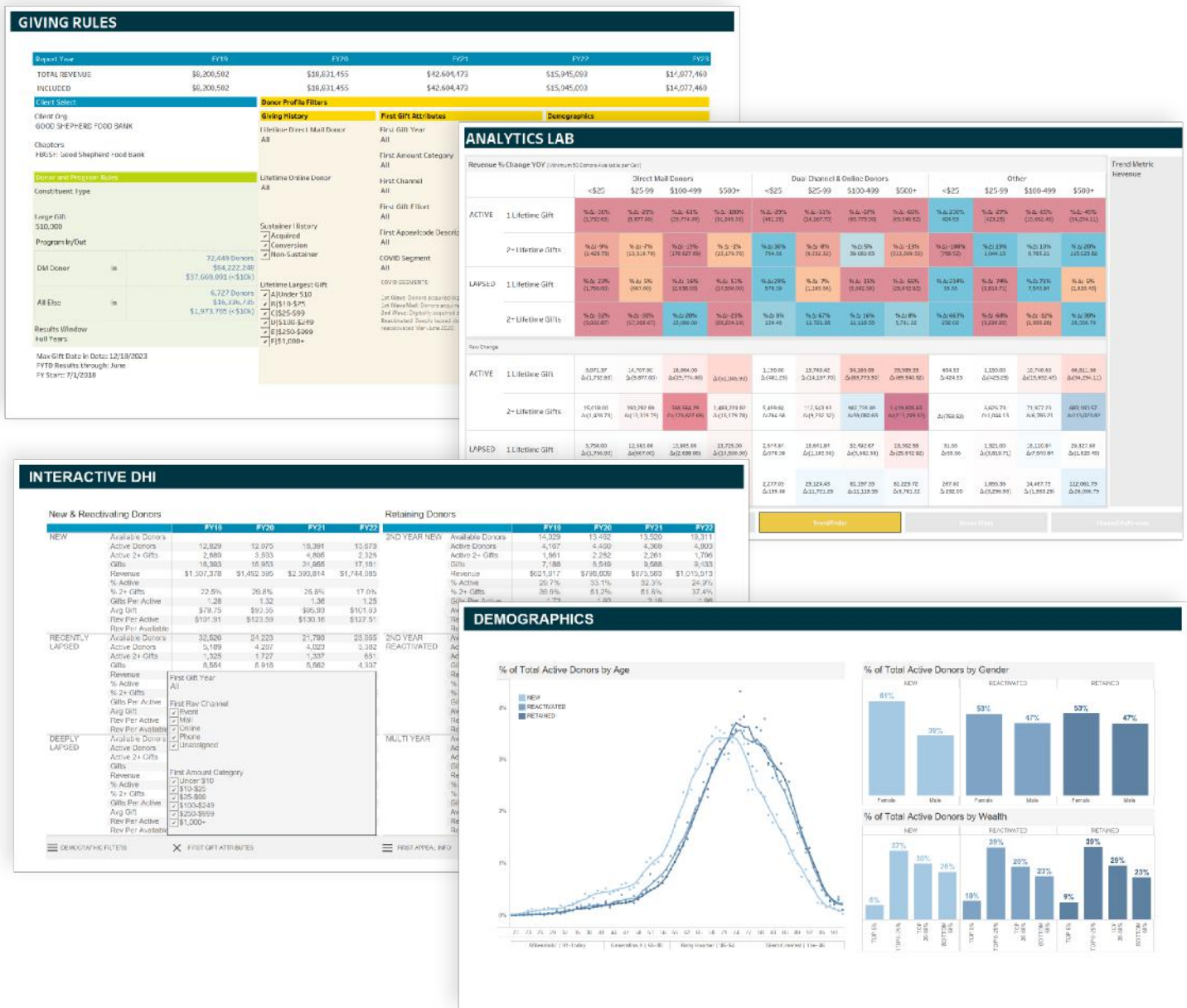
This framework tracks donors through charitable-loyalty lifecycles, enables multi-year projections, and tracks metrics like retention, gift frequency, and others over time. What sets this tool apart from similar frameworks is the ability to define and redefine the audiences we're examining in real time to uncover truly actionable trends.

Performance Benchmarking

Nonprofits we serve who choose to participate in benchmarking receive the benefit of comparing their performance to their peers in the industry.

Industry & Peer Benchmarking

C2. Analytical Tools and Reports: List the tools and software the agency uses for monitoring campaign performance, along with sample report formats and how they inform strategy adjustments.



Actionable Insights Tailored to Your Needs

The most impactful insights are rarely found in standard campaign metrics. Utilizing Tableau as our reporting platform enables us to create unlimited views of deep segment and audience performance. The insights gained through our ad hoc analyses, custom views, and category-specific dashboards not only influence strategic recommendations but also help you visualize the impact of those strategies.

With the right approach to interrogating information, you can always make the best decisions.

C2. Analytical Tools and Reports: List the tools and software the agency uses for monitoring campaign performance, along with sample report formats and how they inform strategy adjustments.

Curiosity and Proactivity Anchor Our Approach

Campaign Monitoring Is a Mindset More Than a Toolset

At TrueSense, our media team specializes in developing and optimizing media plans across a diverse array of channels and mediums. Leveraging our extensive experience, we execute strategic media plans designed to reach your donors wherever they are. While certain mediums may still be the most directly attributable to receiving gifts, we recognize that in today's interconnected world, every channel can influence overall outcomes.

Your channel execution plan begins with a clear understanding of your business and campaign goals. We then incorporate your data, evaluating the performance of previously used channels. What has worked? What hasn't? What contributed to success? Were there factors like messaging, audience, or creative that impacted performance? We also analyze industry trends and general channel data to understand where and how your target audiences are engaging. By combining these insights with our internal media planning expertise, we design a channel mix tailored specifically to your needs and campaign objectives.

We combine insights from all of your digital channels, such as email marketing, SMS, display, social, and paid search, to create a cohesive and informed ongoing media strategy. By ensuring all digital marketing efforts are aligned and mutually reinforcing, we optimize overall campaign effectiveness.

In looking at an example for your Giving Day, for instance, we know that the primary goal of course is revenue. However, there would also be the goals of reaching new donors and younger donors, increasing the average gift size from all donors, growing gift value from existing donors, and some education around why to give to March of Dimes. Leveraging these additional goals and what we know about audiences in the various media channels, we'd consider paid search; performance max; programmatic display; programmatic native; paid social on Meta and Instagram; YouTube; and organic social on Facebook, Instagram, LinkedIn, and X/Twitter.



C2. Analytical Tools and Reports: List the tools and software the agency uses for monitoring campaign performance, along with sample report formats and how they inform strategy adjustments.

Programmatic Campaign Monitoring

We lean on several proprietary and platform-side solutions for ongoing and real-time monitoring of digital campaign performance.

Chief among these is the Basis DSP, which we would use for most of our programmatic omnichannel efforts on behalf of your organization. Basis DSP is the only demand-side platform united with search, social, and site directly via a single interface. It grants us access to an entire programmatic universe of inventory, audiences, and data sets — plus the ability to **plan**, **buy**, and **manage** campaigns on your behalf.

Basis In-Platform Monitoring by Channel

NAME	DATA THRU	GROSS TOTAL SPEND	IMPS	CLICKS	CTR	GROSS TOTAL CONTRACTED	CONVERSIONS
Search	07/05/23 - 12/31/23	\$11,729.85	6,928	1,915	27.6...	\$19,000.00	103
Social	07/18/23 - 10/05/23	\$1,155.07	90,865	220	0.242%	\$3,000.00	10
DSP	07/05/23 - 12/31/23	\$5,999.96	1,434,852	315	0.022%	\$6,000.00	99
TOTAL		\$18,884.88	1,532,645	2,450	0.160%	\$28,000.00	212

Line Items 07/05/23 - 12/31/23 data as of: May 30, 2024 at 12:00am EDT Filter Search Line Items...

NAME	NET MEDIA SPEND	NET MEDIA DAILY TARGET	IMPS	CLICKS	CTR	CTC	VTC	REVENUE	ECPM	ECPC	ECPA	AV 100%
Behavioral, Contextual, LAL, Retargeting	\$5,999.96	--	1,434,852	315	0.022%	0	99	\$17,877.13	\$4.18	\$19.05	\$60.61	0

Basis In-Platform Monitoring by Tactic

Tactics

07/05/23 - 12/31/23

data as of: May 31, 2024 at 2:40pm EDT

1 Filter

Search Tactics...

Hide line item

	NAME	NET MEDIA SPEND	IMPS	CLICKS	CTR	DSP ECPM	DSP ECPC	DSP ECPA	CONVERSIONS	CTC	VTC	TOTAL REVENUE	CTC REVENUE	VTC REVENUE	ROAS	AV 100%
	Contextual-Desktop	\$1,896.64	499,507	122	0.024%	\$3.80	\$15.55	\$63.22	30	0	30	\$3,860.18	\$0.00	\$3,860.18	\$2.04	
	LAL-Desktop	\$1,102.02	213,459	51	0.024%	\$5.16	\$21.61	\$220.40	5	0	5	\$758.17	\$0.00	\$758.17	\$0.69	
	Behavior - Desktop	\$1,305.11	274,350	54	0.020%	\$4.76	\$24.17	\$76.77	17	0	17	\$2,441.01	\$0.00	\$2,441.01	\$1.87	
	Retargeting-Desktop	\$1,696.20	447,536	88	0.020%	\$3.79	\$19.27	\$36.09	47	0	47	\$10,817.77	\$0.00	\$10,817.77	\$6.38	



We use one of the **top-ranked demand-side platforms** available to the market to orchestrate brilliant omnichannel experiences for your constituents and monitor them in real-time to **safeguard your marketing investments**.

C2. Analytical Tools and Reports: List the tools and software the agency uses for monitoring campaign performance, along with sample report formats and how they inform strategy adjustments.

In-Platform Social Monitoring

Our team of digital strategists and technical subject-matter experts also works across social media networks, like Facebook and LinkedIn, overseeing campaign and ad performance.

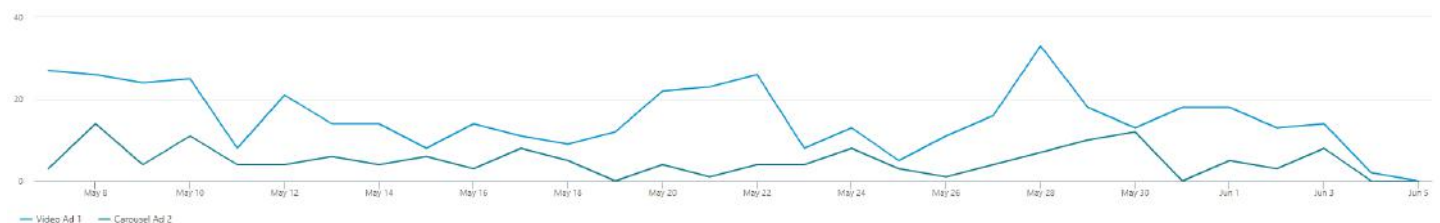
Facebook In-Platform Ads Manager

Off / On	Campaign	Amount spent	Reach ↓	Frequency	Impressions	Link clicks	CTR (link click...)	Results	Cost per result	Purchases	Purchases conversion value
<input type="checkbox"/>	SEP-Christmas2023	\$12,998.62	148,542	6.76	1,004,246	3,119	0.31%	1,986 Website purchases	\$6.55 Per Purchase	1,986	\$466,867.54
<input type="checkbox"/>	SEP-YearEnd2023	\$4,096.00	128,563	3.16	406,021	1,021	0.25%	842 Website purchases	\$4.86 Per Purchase	842	\$234,773.72
<input type="checkbox"/>	SEP-GivingTuesday2023	\$9,730.00	84,523	6.41	541,807	1,339	0.25%	1,344 Website purchases	\$7.24 Per Purchase	1,344	\$236,535.39
<input type="checkbox"/>	SEP-Thanksgiving2023	\$2,369.89	76,779	3.47	266,453	595	0.20%	300 Website purchases	\$7.90 Per Purchase	300	\$47,271.80
<input type="checkbox"/>	SEP-HerOnlyMeal2023-Match-Ad2	\$2,848.11	63,422	3.91	247,731	725	0.29%	127 Website purchases	\$16.09 Per Purchase	127	\$25,826.55
<input type="checkbox"/>	SEP-FoodSecurity2023-A-Double	\$2,500.00	50,766	4.40	223,568	629	0.28%	162 Website purchases	\$15.43 Per Purchase	162	\$22,882.05
<input type="checkbox"/>	SEP-HerOnlyMeal2023-Match-Ad1	\$2,837.21	49,372	4.55	224,789	553	0.25%	156 Website purchases	\$18.19 Per Purchase	156	\$26,219.85
<input type="checkbox"/>	SEP-FoodSecurity2023-B-2X	\$2,500.00	48,398	4.55	220,393	593	0.27%	129 Website purchases	\$19.38 Per Purchase	129	\$19,585.45

LinkedIn In-Platform Campaign Tracking

Campaign Name	Key Results	Spent	Impressions	Clicks	Average frequency	Cost Per Result	Conversions	Conversion Rate	Cost Per Conversion
2 campaigns	-	\$3,453.02	286,496	4,970	1.69	-	612	12.31%	\$5.64
Video Ad 1 ID: 300008544 · Sponsored Content	3,214 Engagements	\$1,662.92	251,660	3,214	1.81	\$0.52	466	14.5%	\$3.57
Audience Network - In-stream	372 Engagements	\$270.67	45,416	372	-	\$0.73	97	26.00%	\$2.79
Audience Network - Native, Banner, Interstitial	2,727 Engagements	\$1,307.70	203,855	2,727	-	\$0.48	260	9.53%	\$5.03
On LinkedIn	115 Engagements	\$84.55	2,389	115	-	\$0.74	0	0%	-
Uncategorized	-	-	-	-	-	-	109	-	\$0.00
Carousel Ad 2 ID: 300008604 · Sponsored Content	1,756 Engagements	\$1,790.10	34,836	1,756	1.29	\$1.02	146	8.31%	\$12.26
Audience Network - Native, Banner, Interstitial	1,755 Engagements	\$1,789.22	34,807	1,755	-	\$1.02	146	8.32%	\$12.25
On LinkedIn	1 Engagements	\$0.88	29	1	-	\$0.88	-	-	-

LinkedIn In-Platform Conversion Timing



C2. Analytical Tools and Reports: List the tools and software the agency uses for monitoring campaign performance, along with sample report formats and how they inform strategy adjustments.

Staying on Top of SEM

Our increasingly fragmented and commoditized digital marketing ecosystem makes it harder and harder for nonprofit brands like March of Dimes to truly stand out. We have a team of SEM experts whose mandate is to help you optimize your digital assets and efficiently distribute them across all digital marketplaces. One of the ways we would help you is by supercharging the March of Dimes brand experience across all of the major search engines.

Google Data Studio - Keyword Performance

Performing Keywords

by Recorded Conversions

Ad group	Search Term	Match type	Cost	Clicks	Conversions
1. Brand - general	kids for warriors	Exact	\$12,063	1,428	522.82
2. Brand - general	carline for warriors	Exact	\$5,161.02	1,010	181.58
3. Brand - general (learned)	carline for warriors	Broad	\$18,446.17	1,544	133.12
4. Brand - general (CVC)	kids for warriors	Exact	\$1,369.44	367	82.91
5. Dog - general	rescue dogs for vets	Broad	\$10,677.92	1,895	82.83
6. Brand - general	donate to carlines for warriors	Broad	\$8,117.55	422	59.3
7. Brand - Exact	kids for warriors	Exact	\$1,699.45	723	40.25
8. Brand - general (learned)	kids for warriors	Broad	\$10,808.45	941	40.03
9. Dog - general	dog charity	Phrase	\$7,252.87	1,038	37.28
10. Brand - Exact (giving)	kids for warriors	Exact	\$1,662.75	315	27.83

Google Data Studio - Advertising Channel

Channel Performance

by Impressions, Clicks, Conversion, CTR, Cost

Advertising ch...	Cost	Impressions	Clicks	CTR	Avg. CPC	Conversions	Cost / conv.	Avg. Donation Value	ROAS	Revenue
1. Search	\$176,337.97	861,556	26,618	4.64%	\$2.56	1,937.84	\$90.38	\$238.43	2.58	\$495,852.54
2. Video	\$151,913.09	98,058,337	48,051	0.24%	\$3.16	390.12	\$160.44	\$42.75	0.11	\$14,616.79
3. Performance Max	\$68,972.58	1,268,931	23,358	1.97%	\$2.72	757.78	\$91.02	\$235.99	2.59	\$174,552.86
4. Smart	\$11,772.17	1,366,459	22,092	1.61%	\$0.53	571.6	\$205.94	\$194.49	0.84	\$10,814.84
Grand total	\$415,318.8	22,312,983	128,498	0.58%	\$3.23	3,116	\$132.21	\$211.84	1.39	\$652,990.7



Google Data Studio - Period Comparisons

KPI's - Period-over-Period

by Impressions, Clicks, CTR, Cost

Impressions	Clicks	CTR	Avg. CPC	Cost	Conversions	Conv. rate	ROAS	Revenue
22.3M	128.5K	0.6%	\$3.23	\$415.32K	3.1K	+0.0%	1.6	652,991
↑ 2,447.5%	↑ 320.9%	↑ 93.5%	↑ 57.7%	↑ 563.8%	↑ 334.6%	↑ 99.2%	↑ 6.0%	↑ 607.0%



Top Campaigns

by Impressions, Clicks, Conversion, CTR, Cost

Campaign	Impressions	Clicks	CTR	Conve..	Cost
1. brand - search - evergreen	75,864	13,758	18.78%	1,168.81	\$22,638.54
2. gsm - brand & holiday - evergreen	1,283,931	25,350	1.97%	757.78	\$68,972.58
3. youtube - conversions	6,071,358	41,863	0.69%	368.12	\$76,703.63
4. dog - non-brand - search - evergreen	161,844	7,309	4.74%	328.01	\$27,277.08
5. veteran - non-brand - search - evergreen	204,782	7,349	3.59%	229	\$27,445.97
6. RLISA - search - evergreen	2,279	678	29.75%	132.25	\$7,949.38
7. brand - smart campaigns - evergreen	1,565,695	22,092	1.41%	57.14	\$11,772.17
8. Demand Gen - retargeting	558,587	8,569	0.84%	29	\$2,315.99
Grand total	22,312,983	128,498	0.58%	3,116	\$415,318.8

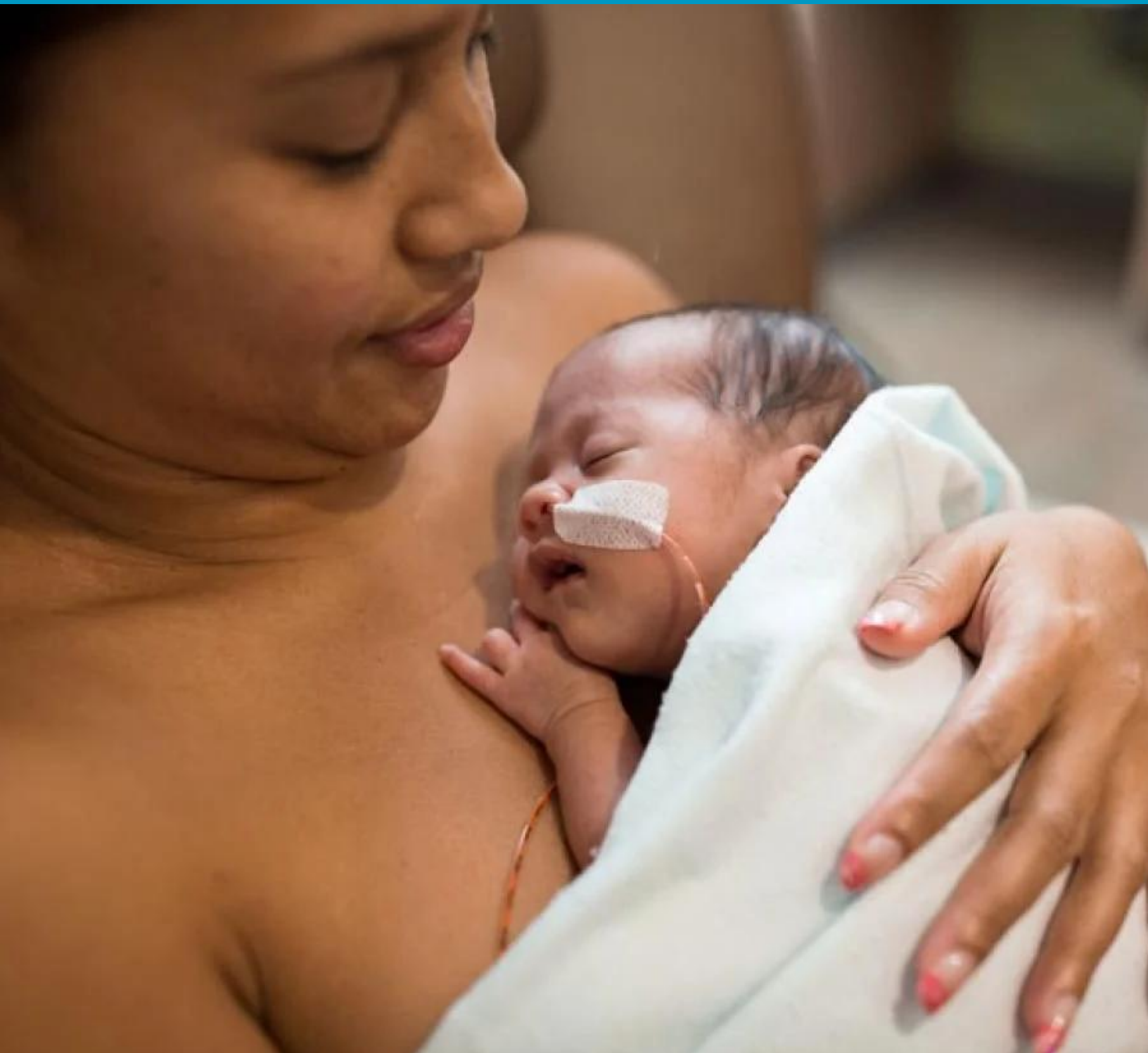
Top Campaigns



“

The ultimate search engine would basically understand everything in the world, and it would always give you the right thing. And we're a long, long ways from that.

Larry Page
Former CEO, Google



D. Budget and Timeline

D1. Detailed Budget Breakdown: Present a budget that categorizes expenses by channel, campaign phase, and any additional costs, providing clarity on the allocation of the \$17.5 million budget.

Our Budget Approach | Summary & Direct Mail

To maximize the impact of our \$17.5 million budget, we have carefully allocated funds across various tactics and channels to ensure an integrated and strategic approach to amplify impact, focus on net revenue, enhance brand awareness, and support healthy omnichannel donor retention.

[A full draft budget can be found here.](#)

CHANNEL	SERIES	GIFTS	REVENUE	TOTAL COST	NET	ROI
Direct Mail	Acquisition	91,227	\$1,829,110	\$3,977,542	-\$2,148,432	0.46
	Appeal	558,842	\$15,705,896	\$7,928,980	\$7,776,916	1.98
	White Mail	10,500	\$304,500	\$0	\$304,500	
	Carry Over	25,600	\$678,400	\$0	\$678,400	
	Acknowledgments	37,783	\$680,085	\$321,945	\$358,140	2.11
Direct Mail Total		723,951	\$19,197,991	\$12,228,467	\$6,969,524	1.57
Telemarketing	Appeal	7,230	\$343,500	\$268,908	\$74,593	1.28
	Sustainer	810	\$110,565	\$44,300	\$66,265	2.50
Telemarketing Total		8,040	\$454,065	\$313,208	\$140,858	1.45
Digital	Acquisition	15,700	\$1,877,000	\$3,200,000	-\$1,323,000	0.59
	Appeal	7,578	\$813,655	\$298,487	\$515,168	2.73
	Support Fees	0	\$0	\$146,875	-\$146,875	0.00
Digital Total		23,278	\$2,690,655	\$3,645,362	-\$954,707	0.74
Agency Fees	Retainers	0	\$0	\$1,302,550	-\$1,302,550	0.00
Agency Fees Total		0	\$0	\$1,302,550	-\$1,302,550	0.00
Grand Total		755,269	\$22,342,711	\$17,489,587	\$4,853,124	1.28

Direct Mail: The legacy direct mail program at March of Dimes continues to be a cornerstone of your direct response efforts and accounts for a large share of overall revenue. The proposed direct mail budget ensures we maintain continuity to maximize current successful strategies deployed in this mature program while also bringing a fresh perspective aimed at exploring omnichannel, audience-led approaches.

Leading organizational change within this higher-cost channel will require that we scale thoughtfully, keep industry trends top of mind, and mitigate risk while maximizing learnings to achieve sustainable growth. Our direct mail budget for 2025 follows that recipe.

Each effort will be planned alongside associated omnichannel efforts where audience selections and creative will be reviewed and updated in alignment with our larger strategic goals.

The Dime creative is consistently utilized in current direct mail efforts in all programs and, while the proposed budget includes the continued use of that approach, we’ve planned to identify strategic placement for testing

new creating messaging and format aimed at sustaining strong response rates and improving overall net. Additionally, we’ve budgeted with the goal in mind of a seamless donor experience with the March of Dimes brand and employing a unified and consistent messaging approach across all fundraising channels.

The direct mail marketing communications calendar includes 28 renewal cultivation campaigns incorporating the current use of follow-up mailings and special appeals along with monthly acquisition mailings (excluding June and July) and acknowledgments. As we learn more about your program, we will remain agile and adapt to capitalize on the most lucrative opportunities available within this program.

Finally, **we believe we will be able to identify cost efficiencies for you through the utilization of our production facility and leverage GPS to reduce volumes while preserving revenue.** Pinpointing these program optimizations will require additional data and creative layouts. **For now, we’ve held your package pricing to date with only a modest cost savings, though we believe we will likely find more.**

D1. Detailed Budget Breakdown: Present a budget that categorizes expenses by channel, campaign phase, and any additional costs, providing clarity on the allocation of the \$17.5 million budget.

Our Budget Approach | Digital

CHANNEL	SERIES	GIFTS	REVENUE	TOTAL COST	NET	ROI
Digital	Acquisition	15,700	\$1,877,000.00	\$3,200,000.00	-\$1,323,000.00	0.59
	Appeal	7,578	\$813,655.00	\$298,487.00	\$515,168.00	2.73
	Support Fees	0	\$0.00	\$146,875.00	-\$146,875.00	0.00
Grand Total		23,278	\$2,690,655.00	\$3,645,362.00	-\$954,707.00	0.74

Digital: To continue scaling and enhancing your current digital program, our plan focuses on leveraging the power of an omnichannel approach while ensuring there is a strategic focus on maximizing the potential of online platforms to grow, retain, and upgrade your donor audience. Our digital program considers the importance of strategic cultivation, advocacy, and newsletter touchpoints with the need to acquire digital-first donors. As a result, **we've developed a robust digital plan that not only balances cultivation and acquisition but creates synergy across tactics deployed in direct mail and telemarketing.**

For acquisition, we developed a comprehensive media plan that ensures brand awareness, acquisition, and cultivation appeals are optimized across creative production, in and across selected channels, and audiences. Our paid media budget proposal includes various channels aligned with your goals and audiences and will include paid search, paid social, programmatic (display, video, audio, native, OOH), CTV, television, and live streaming. With ongoing optimizations and adjustments made by our expert media team, our digital acquisition campaigns allow for year-round growth of new digital donors. **With the desire to expand your omnichannel efforts, investment in acquiring digital-first donors will be imperative to this future success.**

Our acquisition efforts in digital are paired with a comprehensive cultivation, advocacy, and engagement plans to connect with and convert your existing audiences.

In total, we have 10 cultivation appeals that include multiple email sends, programmatic display ads, paid social ads, SMS, website banners, organic social posts, and four creative versions for select audiences. This is complemented with monthly e-newsletters to illustrate impact and program initiatives as well as 13 advocacy and engagement appeals deployed via email, SMS, and organic social posts.

Support Fees encompass valuable and informative tools we utilize to enhance, optimize, and test digital tactics.

This includes website testing and heat map tracking via Crazy Egg, integration with Movable Ink to provide data-based dynamic content in email, access to the Prompt.IO texting platform, biannual e-appends, and dedicated budget to support creative and channel testing.

Together, we will develop a partnership that focuses on ongoing optimizations to current efforts while ensuring flexibility and nimbleness to respond to strategic opportunities.

D1. Detailed Budget Breakdown: Present a budget that categorizes expenses by channel, campaign phase, and any additional costs, providing clarity on the allocation of the \$17.5 million budget.

Our Budget Approach | Telemarketing & Agency Fees

CHANNEL	SERIES	QUANTITY	GIFTS	REVENUE	TOTAL COST	NET	ROI
Telemarketing	Appeal	120,500	7,230	\$343,500	\$268,908	\$74,593	1.28
	Sustainer	20,000	810	\$110,565	\$44,300	\$66,265	2.50
Telemarketing Total		140,500	8,040	\$454,065	\$313,208	\$140,858	1.45

Telemarketing: Integrating phone strategies into our broader omnichannel approach provides a great opportunity for direct communication with your donor base, valuable real-time feedback, and the opportunity for mid-level and major donor cultivation along with sustainer conversion.

The Telemarketing budget includes two sustainer conversion calls to support the current sustainer efforts by bringing on 324 new sustainers resulting in \$6,150 in monthly revenue; three active and lapsed calls coordinated with key direct mail and digital campaigns; and one major donor and mid-level donor outreach to further the impressive engagement March of Dimes has seen with those audiences to date.

Agency Fees: Your service model will be based on an Agency-of-Record (AOR) approach. That is, we base our engagement on an agreement to provide you professional services defined by an agreed-upon Scope of Work. **Our fees are based on the number of full-time employees we estimate will be needed to manage the program. We are fully retainer-based and do not mark up your production.** All Agency Fees are an annual budget which would be billed in monthly increments. Brief descriptions of each are listed below.

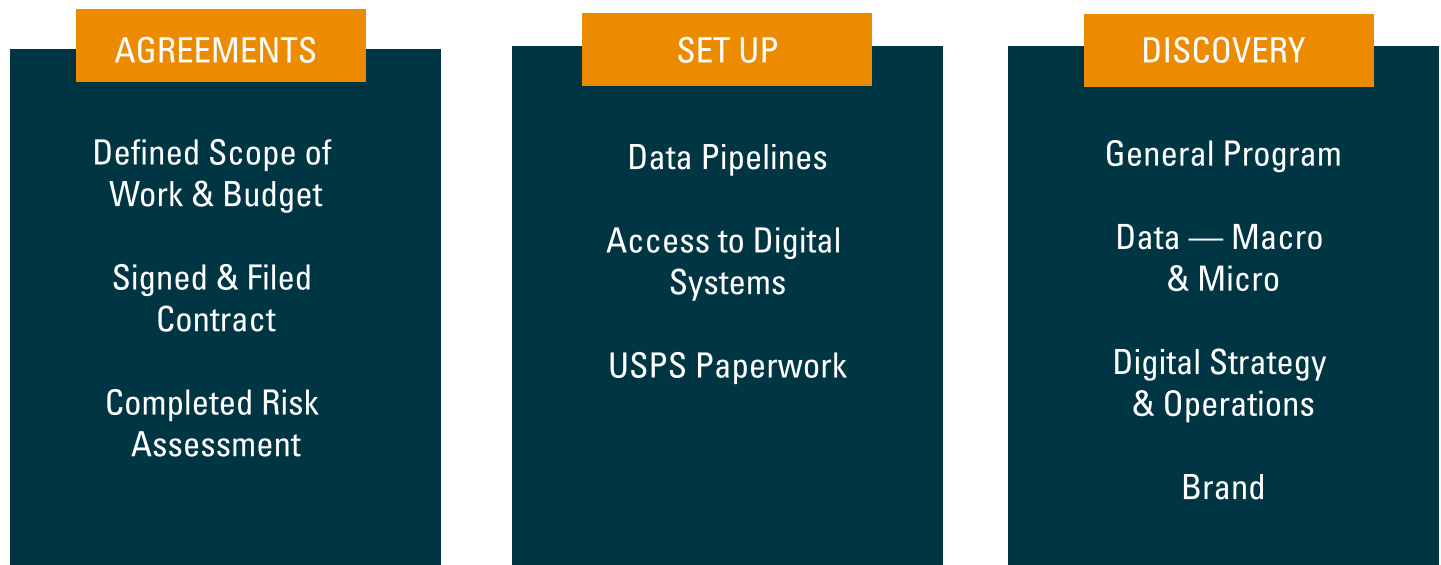
CAMPAIGN	Total
Digital Tech Retainer	\$19,550.00
Account Management & Reporting Retainer	\$580,000.00
Integrated Strategy & Analytics Retainer	\$450,000.00
Data Management Retainer	\$54,000.00
Creative Retainer	\$175,000.00
GPS	\$24,000.00
Grand Total	\$1,302,550.00

- **Account Management & Reporting Retainer** — This budget represents 4.5 FTEs across Account Management and Project Management to support your program. These individuals would be your day-to-day contacts as well as oversee all planning, projects, budget management, and ongoing reporting.
- **Integrated Strategy & Analytics Retainer** — This budget represents 2.5 FTEs within our Strategy and Analytics department who will play integral roles in strategy development across general strategy, digital strategy, and media planning. Additionally, this includes time for a data analyst to process our full file Donor Health Index and other ad hoc reporting based on a future agreed-upon scope of work.
- **Creative Retainer** — This budget is reflective of the assumed work to develop creative assets in direct mail as well as multichannel creative strategy and oversight by your assigned Creative Director. Creative support for digital assets is covered within the digital budget.
- **Digital Tech Stack Retainer** — This annual fee covers work within your email platform that may need to be done by the email developer related to data. This may include but is not limited to data extraction for reporting, audience file uploads, and periodic maintenance.
- **Data Management Retainer** — This annual fee covers the ongoing support of the ETL process between the two entities, campaign file selection management, and annual review and ongoing upkeep of Data Governance documentation.
- **GPS** — The budget above covers the build of two customized GPS models as described in our response to B2. The first build will be GPS cultivate and the second will be a model of your choosing. This monthly fee will additionally cover unlimited access and use of the GPS model scores.

D2. Timeline with Milestones: Offer a timeline that includes key milestones for strategy development, channel optimization, campaign launch, and evaluation phases.

Onboarding Milestones

Across the onboarding time period, there are key milestones related to formalizing agreements around our partnership, setting up the infrastructure for execution and conducting thorough discovery. Any delays in these items may lengthen an onboarding timeline.



Onboarding Timeline

Every onboarding plan is unique. On average and under ideal circumstances, thorough onboarding takes approximately four to five months from discovery to final execution of our first campaign together.

	MONTH 1	MONTH 2	MONTH 3
Agreements	<ul style="list-style-type: none">• Draft Contract• Provide State Registration Details, as Applicable• Initiate Data Security Assessments, If Needed	<ul style="list-style-type: none">• Initiate Contract Review• Begin Drafting SOW• Complete Data Security Assessments	<ul style="list-style-type: none">• Finalize Contract• Co-Sign Contract• Finalize SOW• Co-Sign SOW• Begin Filing Contract With States
Discovery	<ul style="list-style-type: none">• Begin Onboarding Documentation• Discovery Meetings Begin• General Program Discovery• Data Discovery Kick-Off• Creative/Brand Discovery• Digital Operations Discovery• Meet Extended Team	<ul style="list-style-type: none">• General Program Discovery Call• Begin Drafting Annual Plan• Digital Operations Discovery• Receive Digital System Access• Complete Data Discovery• Receive First Data Feed	<ul style="list-style-type: none">• Complete Digital System Audit• Finalize Query Process for Digital• Finalize Include/Exclude Logic by Channel• Begin Mapping Data for Prior Two Fiscal Years• QC Reporting
Implementation	<ul style="list-style-type: none">• Review Past Campaign Performance• Draft Pro forma• Begin Drafting Annual Plan	<ul style="list-style-type: none">• Prep First Donor Health Index and Other Reporting• Review Annual Plan• Receive Final Art Files from Previous Agency• Initiate GPS Model Build• Kick Off Early Campaigns	<ul style="list-style-type: none">• Finalize Annual Plan• Implement GPS• Finalize Mail File for First Campaign• Kick Off Remaining Q1 Campaigns

D2. Timeline with Milestones: Offer a timeline that includes key milestones for strategy development, channel optimization, campaign launch, and evaluation phases.

Annual Planning

Through onboarding and annually thereafter, an annual plan will be developed to outline your goals and objectives. This plan becomes the north star of our partnership, ensuring efforts, investments, and testing that ladder back to the goals you aim to achieve. A thorough annual plan will also indicate some initial tactics for execution. As a living, breathing document, this plan is updated throughout the year as efforts are initiated, accelerated, or sunsetted based on program performance.

Your dedicated team is focused on ensuring you reach your goals and objectives. Throughout the year, we use our campaign analysis and strategic analytical tools to keep you apprised of progress toward your goals and optimization of your budget. If we're not reaching a specific objective, we bring it to your attention. We may make recommendations that may include tactical changes in audience, type of campaigns, number of campaigns, new testing, or other possible elements, taking advantage of new opportunities in order to return your bottom-line budget to the original plan.

Tools That Inform and Outline Your Annual Strategy

The following is a list of some of our most important reports and tools that ensure we have an intentional plan for execution and we are always well-informed on your program's progress.

DONOR HEALTH INDEX (DHI) and TRUECAST™

Please see pages 56 (DHI) and 30 (TrueCast) for full descriptions.

ANNUAL PLAN

This document outlines the goals and objectives for the fiscal year at hand. It also tracks key tactics for implementation to support progress toward your goals. Established at the beginning of our partnership, this document should evolve and be revisited throughout the year based on key learnings, new opportunities, or shifts in organizational priority.

ANNUAL PRO FORMA

This is the fiscal-year campaign budget and schedule, which synchronizes with your Growth Plan. The pro forma predicts what we expect for specific campaigns. It includes campaign-level

quantities, audience segments, performance results, and estimated costs. It also shows how each tactic combines to produce your program's annual net revenue. We continually measure performance and cost against the pro forma and course correct as needed to achieve your net revenue objective by the end of the year.

MARKETING AND COMMUNICATIONS CALENDAR (MARCOM)

This calendar will show a full-year view of marketing efforts by audience, including each month and every channel. We track the type of donor impact (episodic, ongoing, or trigger-based) and the key themes and/or offers. This is a key planning tool in considering the cadence and content of communication with your contacts from all areas of your organization.

D2. Timeline with Milestones: Offer a timeline that includes key milestones for strategy development, channel optimization, campaign launch, and evaluation phases.

Campaign Planning

For each campaign, we develop a strategic brief and provide recommendations for campaign assets for all channels at once. Some campaigns may live entirely within a single channel while others may be fully or partially integrated. Upon approval, our team moves into the execution of all elements within a campaign. Omnichannel campaigns are both drafted and executed inclusive of all channels. This allows you to review all creative assets in totality with one another to ensure maximum synergy across the final product. Our clients benefit from streamlined workflows with fewer hand-offs between internal teams.

We have included a sample campaign timeline. This timeline provides a clear overview of the various stages of a typical campaign, including planning, execution, monitoring, and optimization. Each phase is meticulously mapped out to ensure seamless coordination and maximum effectiveness. Timelines can also be customized based on your needs and internal processes.

Standard Campaign Timeline

Over time, TSM has fine-tuned our approach to campaign execution.

Our project management platform, Workfront, can customize multichannel schedules with specific details to suit the unique needs of each client and campaign.

This framework allows for a strategic, data-driven approach to creative as well as quality assurance when executed on time and to plan.

Detailed steps within each section are outlined within Workfront.

Portions of the process in green are owned by TSM, while portions of the process in orange require your involvement and contributions.

TSM Internal Planning Process 12 Days

Campaign Planning. Creative Brainstorm. Preliminary Pricing. Brief Development.

Client Brief Review & Resource Identification 15 Days

Review and approve brief. Identify approved resource.

Creative Development 20 Days

Campaign Launch. Copy. Design. Development. Internal Review. Final Proofing.

Client Review 15 Days

Review of creative. Edits. Review of updated creative. Creative Approval.

Final Production Digital: 3 Weeks DM: 5–7 Weeks

Final Proofing. Material Ordering. Data File Prep. Laser Set-ups. Final QC. Live/Mail.

D2. Timeline with Milestones: Offer a timeline that includes key milestones for strategy development, channel optimization, campaign launch, and evaluation phases.

Evaluation and Channel Optimization

From initial testing to the iterative refinement of campaign strategies, our team utilizes robust analytics to assess performance, identify opportunities for improvement, and determine the most effective course of action. Whether it's evaluating the success of a new campaign or assessing the viability of scaling up a new initiative, our decisions are grounded in comprehensive data analysis.

Throughout the year, we use our campaign analysis and strategic analytical tools to keep you apprised of progress toward your goals and optimization of your budget. We regularly hold strategy meetings with you to keep you updated each month on performance. Additionally, we hold Quarterly Business Reviews that report back on the program performance following the close of each quarter that include performance against projections, year-over-year performance, industry trends, updates on tracking to the growth plan, and recommendations for course corrections or new strategy implementation.

If we see an opportunity or need to change course to meet a specific objective, we bring it to your attention. We will make holistic recommendations that may include tactical changes in audience, type of campaigns, number of campaigns, new testing, or other possible elements, taking advantage of new opportunities across channels to maximize your budget and return.





E. Agency Expertise and Capabilities

E1. Organizational Change Leadership: Describe methodologies and tools used by the agency to guide organizations through marketing transitions, emphasizing the ability to manage change while maintaining or improving fundraising performance.

A Proven Methodology for Nonprofit Transformation

As a trusted partner to nonprofits navigating significant marketing and fundraising transitions, our team brings a wealth of experience and a proven methodology to guide organizations toward sustainable growth. In particular, we understand the challenges faced by organizations that are heavily reliant on a single channel like direct mail.

Our methodology combines collaborative leadership, strategic planning, agile execution, and unwavering commitment to guide nonprofits through the complexities of marketing and fundraising transformation.

Successful transformation demands commitment from all levels of the organization, including clear executive sponsorship and escalation pathing. We work to build a compelling case for change that rallies stakeholders around the vision and helps maintain focus during setbacks.

Our approach begins by fostering collaboration and bringing together key stakeholders — marketing, brand, fundraising, technology — to align goals, identify obstacles, and develop a 360-degree view of the organization and its challenges. This cross-functional group is essential to driving the change required for success.

To ensure ongoing progress and accountability, we establish regular communication and reporting cadences. Weekly meetings with project teams, monthly check-ins with leadership, and quarterly updates with executive sponsors keep everyone aligned and informed. This transparent communication fosters trust, enables course corrections, and celebrates successes along the way.

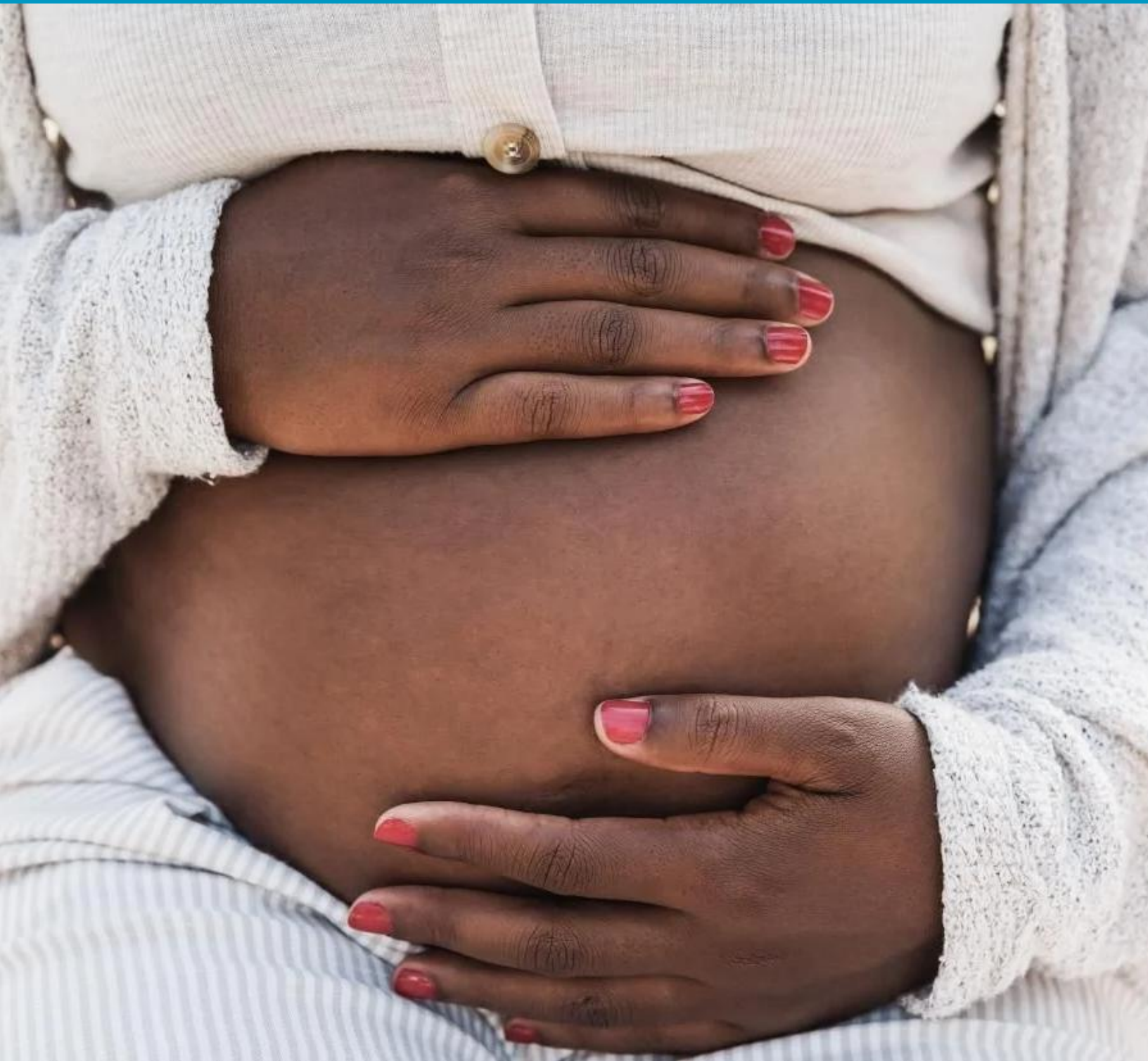
Working through this group, we partner closely on developing a bold, multi-year roadmap for change. At this stage, we help organizations define clear business requirements, key outcomes, and the right KPIs. Within this group, it is critical that everyone have the right

seat at the table and that project work reports up to the proper cross-functional project leaders. This structure ensures we're maintaining that 360-degree perspective while also driving accountability and momentum.

Recognizing the need for flexibility in an ever-changing landscape, we recommend implementing an agile approach to project management. By breaking down large change efforts into smaller, manageable units, we empower business owners to articulate key business requirements and assemble their work teams appropriately.

Our ultimate goal is to empower nonprofits to embrace a more data-driven approach to marketing and fundraising. By leveraging technology, breaking free from single-channel dependence, and aligning brand messaging across all touchpoints, organizations can cultivate deeper, more meaningful relationships with donors. This transformative shift lays the foundation for long-term, sustainable growth and greater mission impact.





F. Financial Management

Holistic Approach to Budgeting



Similar to our campaign planning, which encompasses all channels, we believe in approaching budgets holistically. This approach allows for fluidity across channels, enabling us to capitalize on strong performance and make real-time decisions to meet and exceed client goals.

F1. Budget Flexibility and Adaptation: Detail the approach for managing and adjusting the budget as campaigns progress and strategies evolve, including examples of making strategic pivots based on performance data.

Budget Flexibility

In an omnichannel world, TrueSense Marketing's integrated approach brings seamless integration and budget flexibility between all fundraising channels. Our team is collaborating from the start, creating a comprehensive strategy that works together across all donor touchpoints and channels. This keeps strategy better connected to creative execution, digital engagement, and performance analytics across platforms as well as allowing us to allocate your budget wisely and make informed and real-time decisions on the best dollar spent.

With detailed performance stats reviewed collectively across all channels, this allows our omnichannel team to be as nimble as possible and leverage each channel where most effective. We never "set it and forget it" and value open and collaborative discussions that afford our teams the flexibility to raise the most revenue from the right donor audiences at key moments.

From a budgeting perspective, we focus on managing to your bottom line, ensuring flexibility across channels and throughout your program. During the budget stage, we meticulously price out packages and allocate spend across your program. Additionally, for our direct mail (DM) campaigns, we reprice based on current paper and postage costs during the planning phase prior to the strategic brief. This approach allows for more accurate pricing against actual mailable counts and enables us to make recommendations based on the expected ROI.

In digital cultivation, we will make recommendations campaign by campaign, drawing on the latest results and trends to ensure we are responding to your donors' behaviors. Additionally, our digital advertising efforts are closely monitored to provide ongoing optimizations and adjustments, including budget reallocation, between channels, audiences, and tactics. This enables us to optimize your budget in real-time and allocate funds where they will be most effective.

Finally, your account team will maintain a comprehensive cost tracker across your entire program, monitoring estimates against the budget and actuals, identifying any opportunities to optimize spend and ensure we hold to your annual budget in total.



G. Analytics and Strategy

G1. Optimization Techniques: Elaborate on specific analytic techniques and strategies used to optimize campaigns in real-time, citing examples of past successes in improving campaign performance and ROI.

We Win or We Learn. There's No Time for Losing.

As we have mentioned throughout our response to your request for proposal, marketing has fundamentally changed over the last decade. Fundraisers must adapt to rapidly shifting donor behavior and expectations. We serve nonprofit organizations with a way of working that fosters speed and responsiveness. We bring a test-and-learn approach to marketing — a fail-fast-to-learn-fast mentality so that nonprofits can incorporate feedback and make changes quickly — while managing risk alongside that agile mindset.

For some of the activities and channels you use, the real-time optimization toolbox is relatively thin, like with direct mail. Once a direct mail campaign is in-market there is precious little that can be done to optimize it. For your digital outreach though, the real-time optimization toolbox is teeming with possibilities.

Across digital media, we leverage a number of tools to assist in real- and near-time campaign optimizations. These include things like the latest responsive Display, SEM and Dynamic Creative in Meta (formerly Facebook); real-time or near-time audience targeting optimizations on campaigns within our Basis DSP (noted earlier in our response); and, for real-time optimization of email campaigns, we often encourage nonprofits we serve to use Movable Ink.

Finally, your donation platform presents several opportunities to customize some content on your donation forms depending on email segmentations. We are excited to talk with you about your potential to do dynamic customizations based on UTM parameters and keywords as well!

MOVABLE INK EXAMPLE

Optimization On-the-Fly

Mayo Clinic hosted a 5x challenge where they encouraged recipients in different categories to donate to see their donation multiplied.

To test which CTA would be most effective, Mayo Clinic hosted three different variations: Multiply Your Gift, Give Today, and Give Now. They saw that across most segments Multiply Your Gift performed up to 25% better than their standard Give Now button — which happened to be the worst performer of the three.

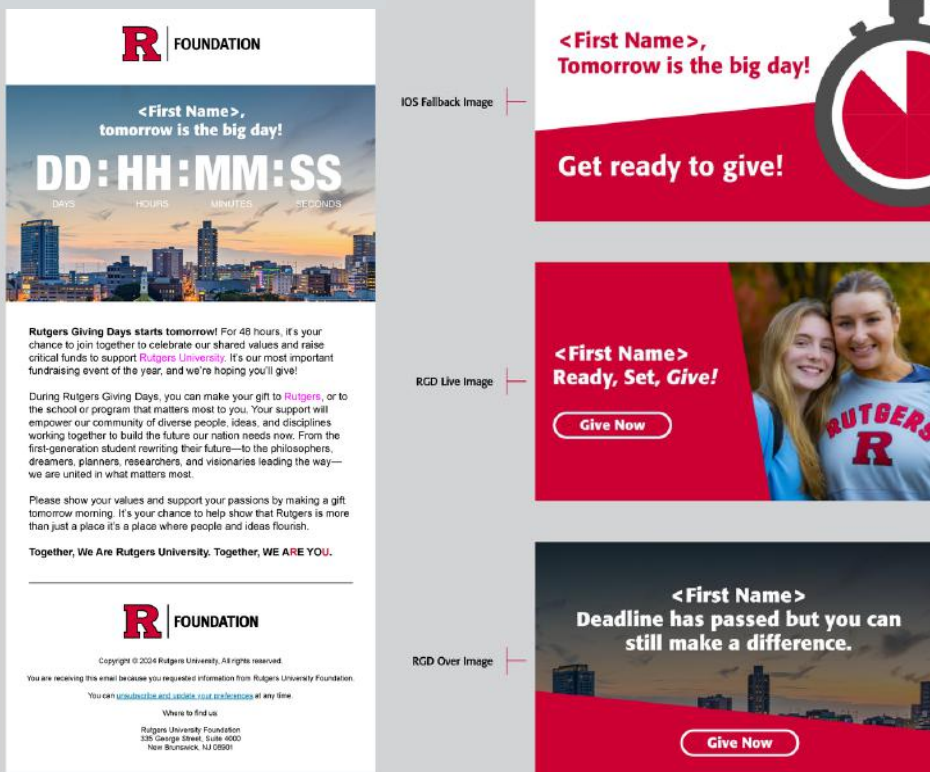
They also hosted two different versions — blue buttons and white buttons — so they could responsively code emails to show to those in light mode (blue) and dark mode (white) on their side.

+25% Lift
Click-Through Rate



Other Movable Ink Examples

Dynamically Change Header Image based on Time of Open





H. Communications and Meetings

H1. Strategic Transition Communication: Propose a communication plan that ensures continuous alignment on transition strategies, including mechanisms for regular updates and strategic consultations.

Our Meeting & Communication Model

Over the course of the year, various team members and leaders from both TrueSense Marketing and March of Dimes will meet to discuss goals for your program and strategies to achieve those goals. On a more frequent cadence, the March of Dimes team and TSM Account team will meet to discuss deliverables and progress to ensure on-time and on-budget execution of those strategies.

TSM Internal Status Meetings

Your TSM team meets weekly to discuss your deliverable, creative questions, issues to be addressed, etc.

Weekly Status Calls

The Client Service Team, Project Manager, and March of Dimes team meet via conference call to review the weekly status report and client deliverables.

Monthly Senior Leadership Calls

A ongoing check-in between March of Dimes and TSM leaders to review progress, talk about challenges, and discuss important action items.

Quarterly Business Review

Report back on the program performance following the close of your second quarter, and a presentation on recommendations for the next fiscal year annual plan.

FYE Business Review

Presentation of fiscal-year-end performance against projections, updates on tracking to growth plan, and recommendations for course correction or new strategy implementation.

H1. Strategic Transition Communication: Propose a communication plan that ensures continuous alignment on transition strategies, including mechanisms for regular updates and strategic consultations.

Reporting When You Need It

In addition to our meeting cadence, we will be able to provide you with a variety of views for both your campaign and donor file performance on an ongoing basis. Our tool sets can answer thousands of questions, with updates as frequently as we receive your data.

During onboarding, we will establish the types of reports you would like to see on an ongoing basis and at what cadence. Additionally, other views can be provided on an ongoing basis.

An example reporting agreement from another client is outlined below.

REPORT	FREQUENCY
Campaign Performance	Biweekly
Audience Performance	Biweekly
Testing Reports	Monthly
Results to Pro Forma Plus Projections	Monthly
Digital KPIs	Quarterly
Donor Health Index	Quarterly
TrueCast Growth Scenarios	Annually
Other Campaign/Audience Views	As Requested



I. Campaign Management

11. Integrated Campaign Strategies Across All Channels

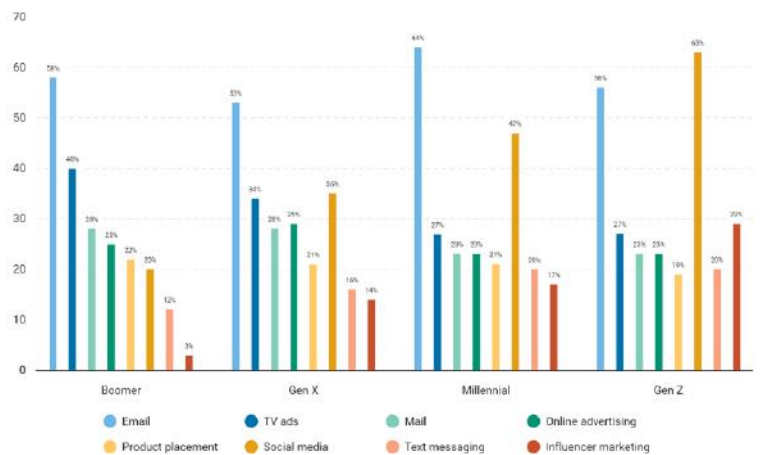
Why Integrated Campaign Strategies?

As organizations shift from a program that is single-channel dominant (usually direct mail) and reset their focus on diversifying giving channels, it is tempting to believe that direct mail donors could be migrated to giving in other channels. In actuality, the number of donors who migrate from giving via direct mail to giving via email, for instance, is often less than 10%. Most donors continue to transact within their channel of origin. This is an analysis we have done for many clients and prospects with consistent results despite program size, maturity, etc.

At the same time, that doesn't mean donors and prospects aren't diversifying the way that they engage with you. In fact, despite many files being dominated by direct mail loyal donors, a 2023 report from Data Axle on generational preferences indicated that email was the preferred medium for engagement with nearly all generations, with Gen Z showing a greater preference for social media.

With a focus on great intention to integrate campaign strategies across channels, this understood diversification in engagement channels vs. giving preferences further supports the need for coordination amongst efforts, offers, and presence to ensure all mediums are executed in concert with one another in a way that drives optimal performance from all mediums.

Because donors are now engaged with you in some but not necessarily all mediums, there are dozens

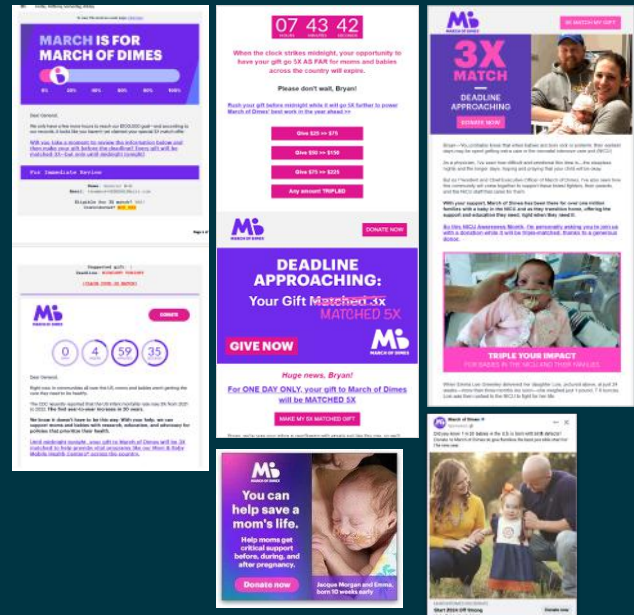


of different campaign experiences happening naturally across your file. Achieving optimal campaign performance requires great intention and coordination. Based on the examples you provided, it's easy to see the difference in the way you are presenting yourself and your offers across mediums:

DIRECT MAIL PRESENCE



DIGITAL PRESENCE




11. Integrated Campaign Strategies Across All Channels

In this section...

As we answer your questions, we will elaborate on how we determine when to use a particular medium, things we will consider to optimize that medium, and provide an example of what that channel expression might look or sound like within a fully involved campaign, such as a Giving Day.

The full array of that imagined Giving Day creative follows this page, and then each channel's integrated impact strategy is elaborated on in the pages that follow.

Finally, we will demonstrate the types of experiences that this type of campaign would create for five different hypothetical donors:



Abby

Generation: Gen Z
Occupation: Student
Prefers: Text to Give



Mike

Generation: Millennial
Occupation: Designer
Prefers: Instagram




Melissa

Generation: Gen X
Occupation: Executive
Prefers: Email



Bill

Generation: Boomer
Occupation: Retired CFO
Prefers: Facebook



Debra


Generation: Senior
Occupation: Retired
Prefers: Direct Mail

[Learn more about these donors here.](#)

Below is sample creative of what a cohesive, channel-integrated campaign may look like as a whole. While some elements may match in the use of color and imagery, others can be different while carrying a consistent tone and theme that allows one to immediately know it is you!


P.O. Box 2972 • Topeka, KS 66608-2972

Your gift goes **2x as far** for
March of Dimes Giving Day!



OF DIMES

Mrs. Debra Sample
 Musical Marketing
 156 Commerce Drive
 Fremont, DE 19340
 410.326.1111



Giving Day

Matching Gifts Every \$1-\$2

~~(\$XX)~~ doubles to become ~~(\$YXX)~~
~~(\$XX)~~ doubles to become ~~(\$YXX)~~
~~(\$XX)~~ doubles to become ~~(\$YXX)~~

*She wasn't too small to be strong!
 Just like your gift!*

Dear Mr. Sample,

Little Emma came into the world too soon. But when she gripped her tiny little hand around her mom's finger and held on tight, Emma's mom knew her little girl was strong.

Sometimes, the smallest babies need to be the **BIGGEST** fighters. And with your support, they can surmount the **strongest** to fight for their lives.

At March of Dimes, we know that small can be strong, just like Emma. That's why no gift is too small this Giving Day – especially while its giving 2x as far thanks to a matching grant.

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over, place

Make My Gift BIGGER with the Match!



MARCH OF DIMES

Mr. Joan Sample
TrueSense Marketing
135 Commerce Drive
Freehold, PA 15042

☒ **YES!** I want my gift to be doubled by the match to help more moms and babies in honor of March of Dimes Giving Day!

- ☒ \$500+ doubles to \$1000+
- ☒ \$200+ doubles to \$400+
- ☒ \$100+ doubles to \$200+
- ☐ My best gift of \$...

☐ I have enrolled a friend to...


☐ I prefer to give the credit card...

☐ Cancel my gift



SEARCH YOUR GIFT HERE

Proceed to Checkout



MARCH OF DIMES

Special Match Opportunity

Giving Day: August 22, 2024

Dear Mr. Sample,

Thank you for your dedication to helping ever baby be healthy.

Sometimes, the smallest babies need to be fit fighters. And with your generous support, they can be the **strongest** to fight for their lives.


That's why I wanted you to be among the first about this opportunity to make your gift **big** stronger – thanks to an \$800,000 Matching Gift of March of Dimes Giving Day on August 22, 2024.

I want you first-hand that small can be strong like Emma.

Little Emma came into the world too soon. But this tiny baby grasped her tiny little hand around a finger and held on tight, mom knew her little girl was strong.

And thanks to the generosity of friends like you of Dimes can fund ongoing research to help keep her the years ahead!

Together with your support, we can march to healthier futures for all moms and babies. Please gift while your gift will be matched!



This advances labor, not babies' powerlessness fight epidemic justice

MEMORANDUM:

Make My Gift Stronger with the Match!

TO: Elizabeth Cherot, President and CEO

FROM: Mr. Bill Sample
Tradition's Marketing
125 Commerce Drive
Fresno, CA 93741

RE: **Yes! I want my gift to be doubled to help advance research and combat toward healthier futures for all moms and babies.**

Dr. Cherot,

I want my gift to be **STRONGER** thanks to a matching grant. Please use my enclosed gift in honor of March of Dimes Giving Day to improve the state of maternal and infant's health through research, education and advocacy to change the lives of families.

I am enclosing:

☒ \$1000+ ☒ \$1

☒ I have enclosed
☒ I prefer to gift
☒ My company will
☒ I need email to
 Your gift is valued




Photo
Image


Small can be *twice as*

STRONG

with your support

March of Dimes - Donor Service Center - P.O. Box 8272 - Tampa, FL 33687-0822

merchot@nied.org



Sometimes, the smallest babies need to be the **BIGGEST** fighters. And [*with your support*](#), they can summon the strength to fight for their lives.

At March of Dimes, we know that small can be strong, just like Emma. That's why [*no gift is too small*](#) this Giving Day – especially while its going 2x as far thanks to a matching grant.

Please consider giving now.

Dr. Elizabeth Cherot, M
To: Mr. Bill Sample

From: Elizabeth Cherot, M.D. | Elizabeth Cherot, M.D. | Elizabeth Cherot, M.D.

See how small can be strong 🧡

From: Elizabeth Cherot, M.D. | Elizabeth Cherot, M.D. | Elizabeth Cherot, M.D.

See how small

Mi
MARCH OF DIMES

Donate Now

Small but strong. Every.

Small hands. Tiny feet. Little, bitty toes.

Sometimes, the smallest babies need to be the **BIGGEST** fighters. And with your support, they can summon the **strength** to fight for their lives.


That's because some things that might seem **small** today, like...
• a **no-cost ultrasound** on our mobile health center...
• a day of training for healthcare professionals...
• a step towards a new breakthrough in research...
and your act of generosity...

can make a **BIG** difference.

At March of Dimes, we know that small can be strong, just like Emma. That's why **no gift is too small** this Giving Day - especially while it's going **zax** as far (thanks to a matching grant).

Help march toward a healthier future for moms and babies. Please give now!

Donate Now



Giving Day

Giving Day

March of Dimes Giving Day is August 22, 2024!

With your support, we can make sure the smallest babies can make the **STRONGEST** impact. Help march toward healthier futures for moms and babies!

© 2010 March of Dimes, a not-for-profit, Section 501(c)(3) organization.

MarchofDimes.org

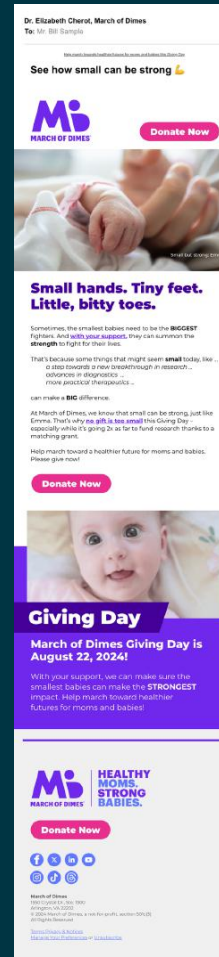
11A.Email Marketing: Outline the process for segmenting audiences to tailor email content, incorporating the use of dynamic content to personalize messages based on donor interests and past interactions.

Email Marketing

Once campaign objectives are established, we evaluate our audience within email to ensure that the campaign creative is reflective of the giving history and preferences of our donors. The goal is to create an email campaign that not only converts donors digitally but complements the full campaign efforts with aligned messaging, design, and offer. We tap into the power of marketing automation, dynamic content, and personalization to enhance our email marketing. Through dynamic content, we create email appeals that center the donor and their giving history at its core. Coupled with applied best practices for digital accessibility, we ensure that our email appeals are effective, accessible, and personalized.

Our email optimization strategy not only includes tactics to personalize the donor experience but incorporates ongoing monitoring and fine-tuning through A/B testing. Ongoing inbox deliverability reporting ensures that we are maximizing effectiveness of your email program by ensuring we're reaching prominent places in your donors' inboxes. The support of additional tools and monitoring increases our knowledge of email metrics and expands our ability to create scalable 1:1 personalization within email.

GIVING DAY EXAMPLE



In our Giving Day campaign example, we focus on leveraging email as a primary digital tactic, with specific creative versioning for donors based on giving preferences and history. We align our creative across email, direct mail, and digital advertising to produce one cohesive campaign that balances personalization and relevancy with cost effectiveness. In our email series, we incorporate personalization and creative versioning to be reflective of primary audience groups within your program to better tailor the appeal to existing donors and email subscribers.

The power of an omnichannel approach is that it allows us to create a cohesive message across influencing and converting tactics. This allows us to leverage the blend of tactics to drive further conversions as we stay top-of-mind across print, digital, and telemarketing channels.

I1B. Paid Search Advertising: Describe the approach to keyword research, campaign structure optimization, and the use of search query analysis to refine campaign targeting and messaging.

Paid Search

If SEM is deemed suitable, we implement a proven strategy involving two distinct campaigns to ensure strong foundational visibility across all relevant search queries for your organization:

- Branded Keywords Campaign: This campaign focuses on keywords directly associated with your organization, such as "donate to March of Dimes" or "support March of Dimes."
- Non-Branded Keywords Campaign: This campaign targets broader, mission-related terms like "donate to charity," "help end infant mortality," and "support prenatal care."

We add specific keywords related to campaigns to dedicated ad groups within the evergreen campaigns on an ongoing basis. Each new ad group features relevant ad copy that directly addresses the keyword and audience intent. For example, a Giving Day ad group will have ad copy emphasizing the urgency and impact of donating on that specific day.

We incorporate various ad extensions to add an extra layer of relevance to your paid search ads. These extensions, chosen based on campaign intent and seasonality, may include site link extensions, callout extensions, price or promotion extensions, and image extensions. Beyond traditional paid search, we also consider additional placements within Google and Bing, including Performance Max and Demand Gen ads, to maximize reach and effectiveness.

Optimization efforts include leveraging in-platform AI algorithms for self-optimization and continuous monitoring by our team of SMEs. This ensures that campaigns are performing optimally at all levels, from high-level performance metrics down to individual keywords. For events like Giving Day, we adjust bids to ensure our ads are competitive for high-intent keywords, increasing bids for event-specific terms or adjusting bids for better-performing locations.

GIVING DAY EXAMPLE

For Giving Day, SEM plays a crucial role in driving awareness and participation. We create two primary campaigns: one for branded keywords like "donate to March of Dimes" and another for non-branded, mission-related keywords. Leading up to the event, we add specific Giving Day keywords to dedicated ad groups with tailored ad copy emphasizing the urgency and impact of donating on that day.

We utilize ad extensions, such as site links and callouts, to enhance relevance and drive engagement. Additionally, we leverage Performance Max and Demand Gen ads within Google and Bing to extend our reach. During the event, we adjust bids to stay competitive for high-intent keywords, ensuring maximum visibility and impact. Continuous monitoring and optimization by our team ensures that the campaign drives significant engagement and donations efficiently.

I1C. Paid Display Advertising: Explain the strategy for selecting display networks and platforms, as well as criteria for creative testing and optimization to improve engagement and conversions.

Display Advertising

We begin by analyzing your target audience's demographics, interests, and online behavior. This helps us determine which networks and platforms are most likely to reach your intended donors effectively.

Platform Selection:

- Google Display Network (GDN): Provides extensive reach across numerous websites, mobile apps, and video content, ideal for broad awareness campaigns.
- Microsoft Audience Network: Accesses premium sites like MSN and Outlook.com, leveraging Microsoft's data for precise audience targeting.
- Programmatic Advertising (via Basis DSP): Uses AI and real-time bidding to place and optimize ads across various sites based on performance.

Platform Choice Criteria:

- Reach and Relevance: Ensuring the platform has a significant presence among your target audience.
- Targeting Capabilities: Evaluating how well the platform can accurately target specific audience segments.
- Cost-Effectiveness: Assessing costs per impression (CPM) and per click (CPC) to ensure value.
- Creative Format Support: Confirming the platform supports diverse ad formats like banners, videos, and rich media.

Creative Testing and Optimization

- We create multiple ad variations with different headlines, images, CTA buttons, and formats (static, animated, video) to align with campaign goals like donations or awareness. A/B testing helps us find and refine the best-performing elements.
- We monitor key metrics (CTR, conversion rates, CPA, engagement) to refine successful ads and use Dynamic Creative Optimization (DCO) to tailor ads in real time, keeping them engaging and effective for maximum impact.

GIVING DAY EXAMPLE

For March of Dimes Giving Day, paid display advertising can play a crucial role in raising awareness and driving participation. We would start by analyzing the target audience and selecting the appropriate platforms, such as GDN, Microsoft Audience Network, and programmatic platforms using Basis. Customized ad creative would be developed, including banners, videos, and interactive formats, tailored to resonate with the audience.

We would conduct A/B testing to identify the most effective ad elements and continuously optimize the creatives to maintain engagement. By monitoring performance metrics and leveraging DCO tools, we ensure real-time adjustments based on user behavior. This comprehensive approach maximizes the impact of the display advertising campaign, effectively driving engagement and donations for the March of Dimes Giving Day.



I1D. Paid Social Media Advertising: Detail the method for audience targeting, including the use of lookalike audiences and retargeting lists, and how campaign performance data will inform ongoing social media strategy.

Paid Social Media Advertising

If paid social media is deemed suitable, we employ a comprehensive approach to audience targeting and optimization:

Audience Targeting:

- **Lookalike Audiences:** We create lookalike audiences based on your existing donor and supporter data, using platforms like Facebook Ads Manager and LinkedIn Campaign Manager. This helps identify new potential donors who share similar characteristics and behaviors with your current supporters.
- **Retargeting:** We build retargeting lists from users who have previously visited your website or engaged with your social media content, including those who have interacted with your posts, watched your videos, or clicked on your ads. This ensures ongoing engagement with individuals already showing interest.
- **Interest-Based Audiences:** We leverage social media platform capabilities to target users based on their specific interests, behaviors, and demographics, ensuring your ads reach users most likely to be interested in your cause.

Creative Customization and Dynamic Content:

- **Customized Creative:** We develop creative assets tailored to specific audiences, ensuring that the messaging resonates with each group.
- **Dynamic Creative Optimization:** We utilize dynamic creative tools to automatically deliver the most relevant ad variations to each user, leveraging platform AI algorithms to optimize message delivery.

Data-Driven Strategy and Optimization:

- **Performance Metrics Analysis:** We monitor key performance indicators (KPIs) such as engagement rates, click-through rates (CTR), conversion rates, and vanity metrics like likes and shares. Additionally, we analyze conversion data to determine which audiences and creatives are driving the most successful outcomes.
- **Ongoing Strategy Refinement:** We continuously optimize campaigns based on performance data, scaling up the best-performing assets and refining or discontinuing underperforming ones. We also implement A/B testing for different ad creatives, targeting options, and bidding strategies to identify the most effective elements.

GIVING DAY EXAMPLE

For March of Dimes Giving Day, paid social media plays a crucial role in driving awareness and participation. We create lookalike audiences based on existing donor data to identify new potential donors and build retargeting lists from users who have previously engaged with March of Dimes content. Interest-based targeting ensures we reach users most likely to support the cause.

Customized creative assets are developed to resonate with these specific audiences, and dynamic creative tools are used to optimize message delivery. Throughout the campaign, we monitor performance metrics and conversion data to identify the most successful elements. Continuous optimization and A/B testing ensure that the campaign remains effective, maximizing engagement and driving donations for the event.



11E. Mobile Marketing and Text Messaging: Share the strategy for crafting compelling SMS/MMS messages, the timing of sends based on donor behavior, and integration with other channels for a cohesive campaign narrative.

Mobile Marketing

To ensure that our SMS tactics are supporting your direct response program, we implement audience segmentation strategies based on previous giving history and donor interests to craft succinct but engaging messages that focus on the donor.

We evaluate the timing of campaign elements from text messages to email sends to direct mail in-home dates to ensure consistent, but not overwhelming, messaging and cohesion across all channels where donors may engage with March of Dimes.

Utilizing a variety of tactics — like automated thank yous, quizzes, and urgent calls to action — creates opportunities to connect with your audience across advocacy and donor cultivation campaigns. When it comes to mobile marketing and texting, it's not just about offering an appeal in a text message format. It's the ability to activate your audience through quick, engaging messages that celebrate their own milestones or bring them closer to the organization through storytelling, advocacy, and affirmation.

GIVING DAY EXAMPLE

In our Giving Day campaign, we utilize SMS to introduce our donor audience to our Small Can Be Strong theme with a short, compelling message and graphic. The goal is to clearly illustrate the concept in a few sentences while ensuring that the graphic highlights the overall campaign theme.

Our proposed timeline would focus on deploying text messages during key milestones in the campaign, such as the kick off, the introduction of our campaign ambassador and story, and the final opportunity to support Giving Day with a gift.



Sometimes, the smallest babies need to be the BIGGEST fighters. And [with your support](#), they can summon the strength to fight for their lives.

At March of Dimes, we know that small can be strong, just like Emma. That's why [no gift is too small](#) this Giving Day — especially while its going 2x as far thanks to a matching grant.

Please consider giving now.

11F. Livestream Fundraising Events: Discuss how these events will be integrated into broader campaign strategies, including promotion across channels and follow-up engagement to convert event attendees into donors or advocates.

LiveStream Fundraising

Once the audiences, objectives, and need are determined, we build the execution plan.

We'll develop a comprehensive promotional strategy that leverages a multichannel approach, including email marketing, social media, and paid advertising, to maximize awareness and attendance. During the event, we plan interactive elements such as live chats, Q&A sessions, and social media shoutouts to keep attendees engaged. Utilizing platform-specific features enhances interaction and visibility, ensuring a dynamic and engaging experience for participants.

Following the event, we implement a robust follow-up strategy to convert attendees into donors or advocates. This includes personalized thank-you emails, social media recaps highlighting the event's success, and targeted retargeting campaigns to reinforce the message and encourage further engagement. This holistic approach ensures sustained impact and long-term supporter relationships.

GIVING DAY EXAMPLE

Using the March of Dimes Giving Day as a potential example utilizing LiveStreamed Events, here is what we envision:

- **Pre-Event Promotion:** For the March of Dimes Giving Day, we would launch an integrated campaign across email, social media, and paid channels to build anticipation. This includes highlighting the event's purpose, special guests, and key activities.
- **Engagement Tactics:** During the event, we would encourage real-time interaction through live Q&A sessions with experts, shoutouts to participants, and interactive polls. This keeps attendees engaged and invested in the cause.
- **Post-Event Follow-Up:** After the event, we would send personalized thank you emails to attendees, share highlights and success stories on social media, and use retargeting ads to encourage donations. Additionally, we would provide exclusive content and updates to convert attendees into long-term supporters.



I1G. Direct Mail Campaigns: Elaborate on the selection process for direct mail formats and messaging strategies, including how direct mail will be integrated with digital campaigns to create a seamless donor experience.

Direct Mail Campaigns

Our favored approach to direct mail package formats and messaging themes is a balanced one that keeps net and long-term value at the forefront. We let previous performance and health of file data create our roadmap and then use a thoughtful, scalable approach to infuse innovative change and new insightful ideas.

Starting with proven creative controls, we incorporate brand standards and palettes to maintain consistency. A comprehensive testing plan is defined before the fiscal year starts, allowing us to experiment with new ideas and messaging and measure their impact effectively.

As cost considerations vary within fundraising mediums along with potential risks, we always consider the most appropriate channel for certain innovations and associated learnings we gain from them. Through the use of our in-house production facility, TrueSense enjoys a more favorable position than most agencies when it comes to managing and producing direct mail campaigns because we do nearly all material ordering, printing, and lettershop production in-house. Envelopes and paper are ordered at large volumes to manage work across the agency and our state-of-the-art digital printing technology means we can run multiple clients together to generate economies of scale but still customize content. Direct mail campaigns are optimized for efficiency, ensuring that our clients reap the benefits of cost-effective solutions to further improve long-term net.

Our extensive experience in executing omnichannel testing plans and utilizing a variety of reporting tools enables us to review results from multiple angles, aligning with larger strategic goals. This data-driven approach ensures that we meet donors "where they are" and tailor our strategies to their behaviors.

This is paramount as our more omnichannel approach takes hold and recognizes that one size does not fit all. We know we need to let our donors and their giving behavior guide us forward. And while the industry and donor behavior are ever-changing, we have an immense appreciation for direct mail and the many amazing ways we can compel our donors to give to March of Dimes inside an envelope!

GIVING DAY EXAMPLE

Direct mail and digital channels will be executed through consistent branding and imagery, coordinated messaging themes across similar campaign dates, customized landing pages and QR codes for direct mail donors, and compelling storytelling in our packages, with a continued narrative through email, social media, advertising, videos, and blog posts.

For example, the August Renewal and Giving Day campaign will kick off with a comprehensive creative brief that provides direction for all channels. This approach allows for a cohesive strategy that spans across channels and provides an opportunity for a holistic creative review, ensuring consistent messaging that supports the shared campaign goal and cohesive donor experience.



I1H. Telemarketing: Provide details on script development, call timing strategies, and how telemarketing efforts will be coordinated with other campaign elements to enhance donor engagement.

Telemarketing

At TrueSense, your telemarketing efforts are led and managed in-house by our Donor Engagement Team (DET), ensuring integration with the full program's overall strategy and campaign planning. This agency capability prevents siloed or disjointed efforts, as our team collaborates seamlessly across Telemarketing strategy development, execution, fulfillment, and reporting, all handled within the agency.

Utilizing advanced modeling tools, we identify the most receptive audience for telemarketing efforts, maximizing reach and supporting the overall objectives of your program. We use a standard scripting template that is customized to reflect the specific case for support, the client's needs, and the target audience, ensuring that each call is relevant and engaging to meet campaign objectives. While scripts serve as guides to meet all legal requirements, our callers are trained to engage in natural, conversational interactions, making the donor feel valued and understood. Additionally, a small group of experienced callers, averaging seven years of tenure, are trained on specific programs with client assistance to ensure familiarity with the campaign's goals and donor preferences.

Our calling hours are Monday to Thursday from 11 a.m. to 8 p.m. CST and Friday from 9 a.m. to 6 p.m. CST, providing flexible scheduling to accommodate various donor availability. Prospects are called up to seven times at different times of the day — morning, late morning, early afternoon, late afternoon, and evening — and on different days of the week to maximize contact rates. Additionally, we offer the option to schedule callbacks at times more convenient for the donor, ensuring higher engagement and response rates.

Telemarketing scripts reference ongoing mailings, reinforcing the campaign's case for support and creating a cohesive donor experience. Calls often serve as follow-ups to mailings, transitioning into thank you calls if a recent gift was made. We design telephone campaigns for every part of the donor journey, including welcome calls for new donors, upgrading current donors, reactivating lapsed donors, and conducting appreciation and stewardship calls. Insights gathered from telemarketing calls are fed back into the overall campaign strategy to refine messaging and improve engagement across all channels.

GIVING DAY EXAMPLE

Integrating telemarketing into our broader omnichannel approach offers a valuable opportunity for direct communication with your donor base, real-time feedback, and the cultivation of mid-level and major donors, as well as sustainer conversion. This tactic is particularly effective during key campaign windows that align with overarching offers and strategies. In the proposed budget, telemarketing is utilized during various campaign windows aligning messaging, including sustainer conversion aligned with similar offers across email and social channels, and for year-end opportunities, enhancing both year-end giving and mid- and major donor conversion.

I11. Television Advertising: Outline the approach for TV ad creative development, media buying strategies, and how television advertising will be used in conjunction with digital efforts to amplify campaign reach and impact.

Television

If television is deemed suitable, we optimize by ensuring seamless collaboration between our creative, strategy, and media teams. We develop compelling messaging and creative content that aligns with the campaign's goals and resonates with the target audiences. Strategic media placements are selected to maximize reach and effectiveness. We partner with a variety of broadcast and cable networks, carefully evaluating channel selections to target desired audiences effectively. Our negotiation strategies aim to optimize the media buy, enhancing reach and frequency while leveraging value-added opportunities. Integrating television with other media channels, particularly paid search, ensures that increased inquiries generated by TV ads are efficiently captured and directed to your brand. Additionally, we incorporate strong calls to action (CTAs) and QR codes in our television placements to facilitate easy access to your website, emphasizing the importance of a seamless landing page experience and on-site conversion optimization.

GIVING DAY EXAMPLE

For March of Dimes Giving Day, television advertising can play a pivotal role in driving awareness and participation. We would create compelling TV ads that highlight the urgency and impact of the event, ensuring the messaging resonates with a broad audience. These ads would be strategically placed on broadcast and cable networks that align with our target demographics. To maximize the campaign's effectiveness, we would integrate TV ads with a robust paid search strategy, capturing increased inquiries and directing them to optimized landing pages. Strong CTAs and QR codes included in the TV ads would drive traffic to the March of Dimes website, where seamless navigation and conversion paths are set up to turn viewers into donors. This integrated approach ensures that the television campaign not only raises awareness but also drives tangible engagement and donations.





When we went through our latest re-branding, TrueSense was right by our side. As our internal assets and creative methodology rolled out, TSM made sure all of our direct marketing assets aligned. They helped us create an effective rollout communication strategy on and offline, not only for donors to see the new branding but for them to help us celebrate our new look and vision. TSM has always been open to our creative feedback, and we work together to ensure the ethos of our brand is productively represented in our shared work.

— Cassie Gilman
Chief Development Officer
Regional Food Bank of
Oklahoma

I2. Full Campaign Collateral: Emphasize the importance of brand consistency across all materials and the process for ensuring all campaign collateral, from digital ads to direct mail pieces, aligns with the overarching campaign message and goals.

Representing You, Wherever You Are

We strongly believe great organizations like yours start not with WHAT you do but with WHY you do it. We believe that your donors, through their generosity, trust your brand to help them end preventable health risks to mothers and newborns and close the health equity gap for all families.

Communicating that message of impact has long been a recognized driver of donor action, but we always want to do that while supporting, leveraging, and aligning with your unique brand and voice.

We will want to work with you to do a deep dive into your internal communications, mission, style, and brand guidelines and will study existing materials that are a good representation of your voice. As part of onboarding, we also would want to meet with your internal communications or marketing teams to understand their perspective from those who set that tone.

Then we will work to create messaging and materials that consider audience identification, image selection, and tangible offers that leverage — and honor — your unique brand and demonstrate both great need and great outcome.

This may include adjusting your message based on donor segment or point of acquisition. In addition, we will stay nimble and ready to adjust messaging and approach as needed for emergencies or other urgent needs.

Overall, we believe giving your donors experiences that demonstrate your WHY and communicate with them based on their relationship with you is key to influencing their giving behaviors.

We will work to tap into your strong passion and vision, use innovative concepts and technologies to push the borders of your program, and deliver experiences that better inform them of your important work and their role in supporting it.

Your Donors Define Your Messaging Strategy

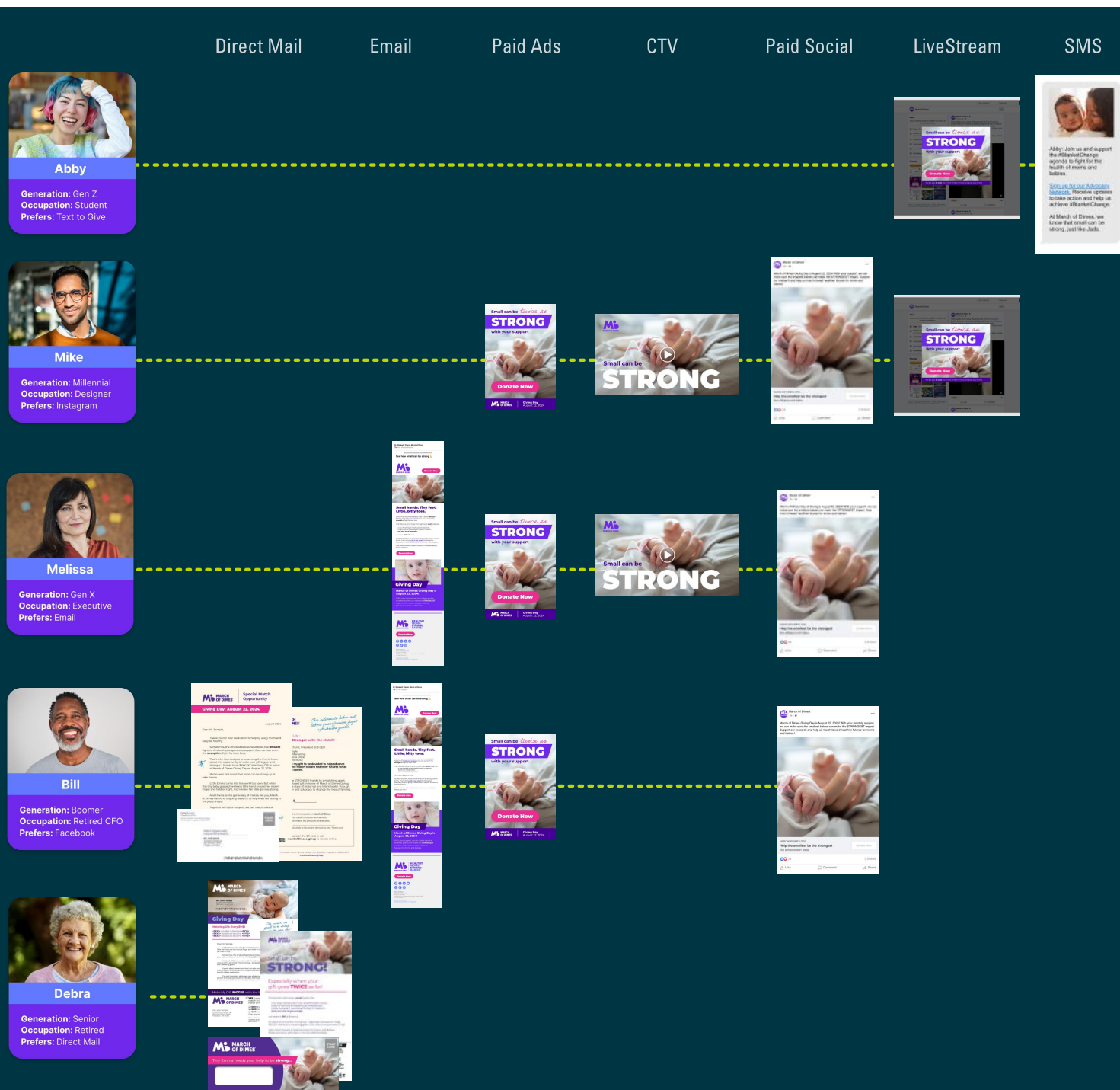
[Learn more about their experience here.](#)

	Personas	Messaging Approach	Ways of Engagement
 <p>Abby Generation: Gen Z Occupation: Student Prefers: Text to Give</p>	Abby is a student at a community college. While she doesn't have much disposable income at this time, she is passionate about women's access to health care. Like most her generation, giving using her smartphone is most convenient.	Abby doesn't know a lot about March of Dimes, but she's passionate about advocating for and getting involved in organizations that uplift women. That said, we also recognize her limited financial capacity as a student. Her messaging approach would lean in on her desire to stand with women and babies, but reassure her that any gift — even a small one — is an important component of the movement.	Abby has opted into SMS. Abby recently changed emails and the email in the database is now inactive.
 <p>Mike Generation: Millennial Occupation: Designer Prefers: Instagram</p>	Mike is a graphic designer who has just purchased his first home and recently got married. His wife works in health care, which made him passionate about related issues. He wants to make a difference, so he made his gift while checking out a livestream fundraising event.	Mike has heard of March of Dimes but doesn't know much about the organization. His messaging approach would be educational, leaning into his affinity for health causes.	Mike is a digital prospect who will give his first gift, providing his full contact information for the first time during the Giving Day Campaign.
 <p>Melissa Generation: Gen X Occupation: Executive Prefers: Email</p>	Melissa is an executive at a local business. She enjoys giving back to the community, but as a mom with a demanding job, she doesn't have much time. She prefers to give and engage via email and, given her busy schedule, she sees value in subscribing to a sustained giving program.	Melissa is familiar with March of Dimes but specifically cares about women's rights and equity in health care. Her messaging would lean into March of Dimes' efforts around equity and access to care and encourage a sustaining gift to ensure this important work continues.	Melissa is a sustainer and now receives a limited mail cadence but is still informed of a few opportunities to give an incremental gift via digital outreach.
 <p>Bill Generation: Boomer Occupation: Retired CFO Prefers: Facebook</p>	Bill has just begun enjoying his retirement from corporate America. He spends more time than he used to on Facebook looking for new activities and volunteer opportunities to fill his time, which is why a paid ad on social media works well for him.	Bill's daughter had a premature baby, and he learned more about March of Dimes during this time. His messaging would focus on the importance of funding research and other support to ensure the health of all babies and moms.	Bill has supplied his full contact information through past giving and often contributes at or near the Mid-Level giving thresholds.
 <p>Debra Generation: Senior Occupation: Retired Prefers: Direct Mail</p>	Debra is loving life in her 80s. She has been a loyal giver to your direct mail for years. She loves to share with others why March of Dimes is important to her, making her someone who might be very interested in hearing from a planned giving officer.	Debra has great familiarity with March of Dimes and remembers why it was founded. Her messaging would emphasize how important it is to continue to expand the work beyond where it began to include all health issues that affect moms and babies, including their access to care.	Debra prefers direct mail communication and writing a check to make her annual giving contributions. She doesn't use email or social media and thus hasn't provided an email address for digital communication.

Pulling It All Together

While the Giving Day Campaign as a whole may contain more than a dozen elements when complete, it's important to recognize that likely no donor will see every single element. This is one reason the development of a solid integrated campaign is essential. This will ensure that any combination of the elements carries a consistent tone and offer, recognizable to the donor as March of Dimes and recognizable as your Giving Day.

Below is an illustration of the type of experience these donors may have within this campaign based on available channels, available data, and level of engagement.





Additional Question - Creative Execution: The process for developing content that aligns with our brand and effectively communicates with the various donor segments should be detailed, ensuring consistency across all touchpoints.

Our Creative Approach

Practice | Process | Production

Our overriding creative philosophy is that donors are, through their generosity, an unstoppable force for good. And that by helping your donors be fully-participatory and well-informed, they are themselves nourished.

It is reasonable to conclude, then, that the more that donors understand the impact of their gifts, the more nourished they feel.

Other agencies' conventional messaging platforms might position your donor as the *helper* who enables March of Dimes to end preventable maternal health risks and death, end preventable preterm births and infant death, and close the health equity gap for all families.

Our creative approach would position the March of Dimes as the enabler who makes it possible for donors and advocates to feel they are a key to you fulfilling your mission.

Tactically, we achieve this through audience identification and segmentation, goal-focused creative direction, copywriting, image selection, and tangible offers that leverage your unique brand across channels and demonstrate both great need *and* great outcome.

As we've mentioned, we strongly believe great brands start not with WHAT they do (often described by their mission statement) but with WHY they do it.

This clarity informs what you do. It transcends the mechanics of your work and gets to the outcomes and end results.

I3. Content and Scheduling Coordination: Detail the planning process for campaign scheduling across channels, ensuring that each touchpoint is optimized for maximum engagement and contributes to a unified campaign flow.

First, Consider the Skydiver.

Once the parachute deploys, the skydiver’s view is vast. It takes in hundreds of square miles. This macro view encompasses forests, towns, and plains. But with descent, details emerge. Forests become trees, towns become buildings, and plains become wheat fields. Lower still, and the skydiver can identify pine trees, people on the street, and the rows between crops.

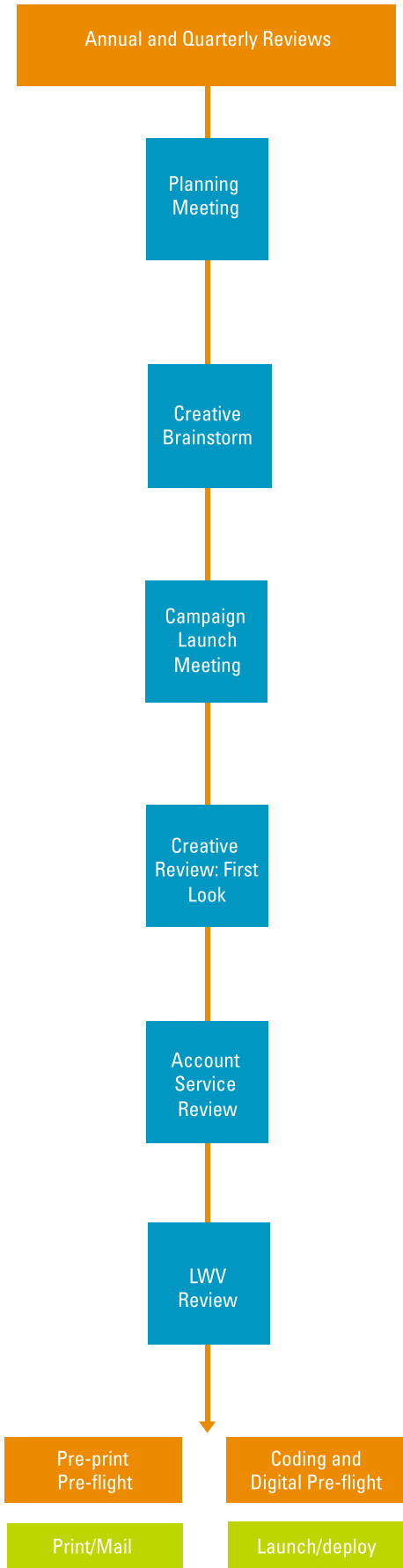
Likewise, our creative approach starts at high altitude, looking at your program with a macro lens. At annual and quarterly reviews, your senior creative team, senior client service, and senior strategy teammates meet with you to review past performance, identify future objectives, define audiences, and sketch in creative tactics for the coming year and quarter for all channels.

Those tactics become fleshed out by your Creative Director at campaign planning meetings, collaborating with your Account Director and Strategy Director. Often, your Creative Director will subsequently meet with your assigned writer and designer in a Creative Brainstorm meeting to frame specifics.

Finally, at ground level, these details are articulated and added to the Creative Brief for your approval, and the Campaign is launched with all relevant client service, creative, and production specialists attending.

We use our project management tool, Workfront, to track progress, deadlines, and deliveries; your review rounds; proofing; coding or pre-flighting; and either print production or digital deployment.

More information on our job timeline flow can be found in response to our answer to question D2.



I3. Content and Scheduling Coordination: Detail the planning process for campaign scheduling across channels, ensuring that each touchpoint is optimized for maximum engagement and contributes to a unified campaign flow.

Content & Scheduling Coordination

Unified campaigns start from within and require not just your agency partner but your organization itself to have a unified, singular view of the constituent.

At TrueSense, we've brought together strategy, digital, creative, and analytics in one integrated team. This unified approach brings diverse experts together to better mirror how donors actually engage with giving today. From your donor's perspective, she proudly supports your brand — regardless of segment or channel type. In other words, she is not proud to support you through digital campaigns versus print. She's a proud supporter who engages with you through all of the channels in which she spends time when it makes sense to her.

Your strategies are born integrated, not bolted together after the fact through hand-offs and approvals.

This results in integrated strategies with built-in momentum that activates across digital ecosystems, traditional media, direct mail, email, social, and experiential channels to deliver the right content, offer, and message to donors where they interact with your organization to maximize engagement and reach.

Marketing Content Calendar

The planning process for coordinating campaign scheduling across channels and optimizing engagement involves developing a comprehensive marketing calendar that provides a full-year view of marketing efforts segmented by audience, including each month and every channel. This calendar tracks the type of donor impact, categorizing them as episodic, ongoing, or trigger-based, and identifies key themes and offers relevant to each type of donor. It serves as a key annual planning tool for determining the cadence and content of communications, ensuring consistency and coordination across all areas of the organization. By optimizing each touchpoint for maximum engagement and contributing to a unified campaign flow, this approach creates a seamless and cohesive experience for the audience. See example on the next page.

Holistic Approach

In addition to a unified marketing calendar, our approach utilizes media mix models that align top-down investment strategies across channels. This integrated strategy practice includes creative, analytics, and data-driven strategy professionals to ensure a comprehensive and cohesive campaign execution. We employ a channel-agnostic campaign architecture and reporting framework, allowing for flexible and effective campaign management. Additionally, tools like our Donor Health Index and Giving Potential Scores assess each constituent at the individual level, providing insights unfettered by channel or program limitations. Behavioral data leads to insights and insights feed strategy, which in turn feed creative and deployment, ultimately leading to fresh donor behaviors and insights. This holistic approach ensures that all elements of our campaigns work in harmony to maximize engagement and impact.

Additional Question - Content Calendar: A proposed content calendar that aligns with key dates and milestones relevant to the March of Dimes' Mission and fundraising efforts.

Content Calendar

The sample content calendar provided aligns with key dates and milestones central to March of Dimes' mission and fundraising efforts and with the TrueSense budget proposal. This comprehensive marketing calendar offers a full-year view of marketing activities by month and channel. Serving as a crucial annual planning tool, it ensures consistent and coordinated communication across the organization. (See I3. Campaign Management: Content & Scheduling Coordination.) Following discovery, we will integrate additional audience segmentation and testing opportunities that unify messaging, offers, and voice across all channels.

[An example Marketing Content Calendar can be found here.](#)



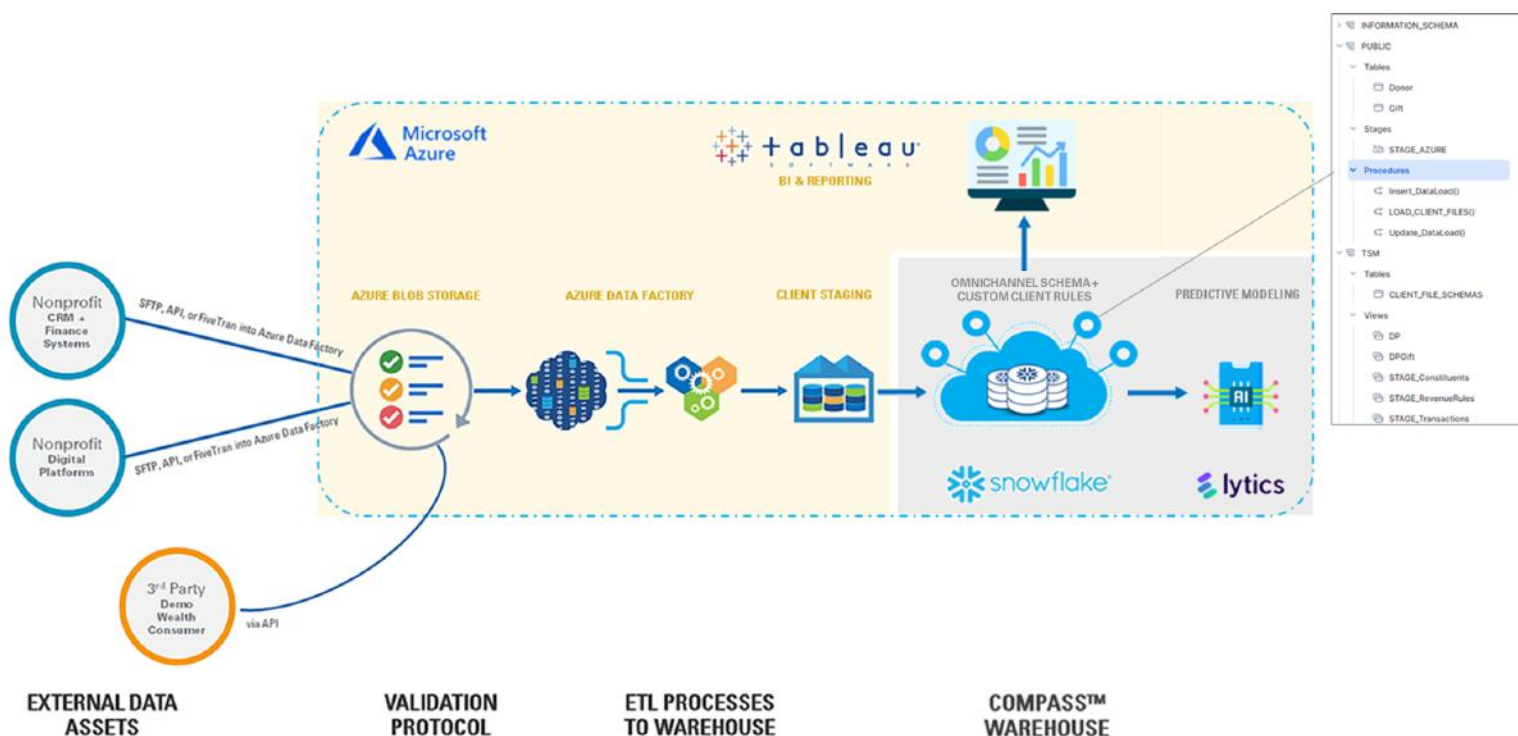
14. Tracking and Measurement Protocols: Describe technologies and methodologies that will be used to track campaign performance across channels, including the integration of data sources for comprehensive performance analysis.

A Unified Data Platform

As we covered earlier in our answers to your inquiries about which software and technology we use to power our analytics and reporting for monitoring campaign performance, we have developed a proprietary channel-agnostic data ecosystem called **Compass**. This ecosystem has an intentional design that allows us to unify all of your disparate channel data in one centralized environment.

Once all your data resides within Compass, we are able to produce and deliver comprehensive multichannel performance reporting, ad hoc analytics, and powerful insights about your fundraising programs.

A simplified view of how your data would flow into our data ecosystem is below.



I5. Agile Campaign Management: Discuss the framework for regular strategy reviews and adaptations, highlighting how data insights and market trends will inform real-time campaign adjustments to ensure responsiveness and agility in campaign execution.

Macro Foresight

We shared with you earlier some details around the meeting cadence in a typical engagement with the nonprofits we serve. Along with the regular weekly and monthly touchpoints with your team, where general campaign insights would be discussed and decisions made, there are also the more robust Quarterly Business Review (QBR) and Annual Review & Planning meetings.

In these quarterly and annual meetings we would cover a variety of recent ad hoc analytics unique to your program; share the insights observed across your competitive peer set, aggregating external third-party data (like cooperative database and other publicly available benchmarks) with our own anonymized nonprofit performance data; share macroeconomic and generational audience trends; and derive guidance from primary research, evaluating and reacting to campaign performance in each channel to make incremental refinements mid-year, with the ultimate goal of presenting you with a set of choices from which we can collectively guide your program forward in an highly informed and agile fashion.

The framework we use generally follows a simple recipe.

Where are you with current performance?

Where does that current trend project out to by year-end?

How do you compare with others?

What are market conditions, and which external factors do we just have to accept versus battle against?

And lastly, where are there new and emerging opportunities — and what are the tradeoffs we need to consider if we elect to explore one of those opportunities for strategic advantage?

With regards to the last question, some examples of topics we regularly discuss with the nonprofits we serve are the emerging opportunities on interactive streaming services like Twitch; if and where gamification has a place in their brand or fundraising mix; what can be done to create a more memorable first-time user experience (FTUE) with an organization; expected impacts of tax law changes; DAF widget placements; the use of generative-AI chatbots for donor support on a nonprofit's website; and dozens of other significant considerations. Our goal is not to force shiny objects into any program but to share as much as we can about these new opportunities so nonprofits can consider what makes sense for them.

Additional Question - Technology and Infrastructure: Proposals should explain how current technology platforms will be utilized or how new technologies might be introduced to support campaign goals and integrate data.

Maximizing and Enhancing Technology Platforms

Our goal at TrueSense is to maximize technological capabilities within your current technology stack as well as enhance your overall program with additional data and dynamic content capabilities through our recommended tools. This means tapping into platform features — such as Marketo's marketing automation capabilities or FundraiseUp's dynamic gift levels — to ensure that current platforms are efficiently utilized throughout our partnership with your organization. The foundation of our program relies on utilizing technology platforms and integrations to their utmost capabilities.

To support our overall deployment of your program and ensure that we're maximizing your program's potential, we bring in additional technology platforms as part of our services to enhance your email and overall digital program.

We track email deliverability, inbox placement rates, and spam placement through Inbox Monster. With regular reporting on inbox trends, we can ensure that your email program is effective and landing in the best spots within your donor audience's inbox.

In addition to Inbox Monster, we bring in the dynamic content capabilities of Movable Ink in key campaigns. Movable Ink is a tech platform that uses AI and automation to personalize data-activated content. This platform provides us the opportunity to generate personalized creative automatically through user data for each email subscriber.

We've also partnered with Prompt.IO to provide texting solutions for clients in a comprehensive mobile marketing and texting platform. To ensure that website and donation pages load optimally, we utilize Crazy Egg for heat mapping and A/B testing to optimize and improve web-based experiences for donors.

As part of our work together, we included all additional tech platforms utilized by TrueSense in your program plans and budget.

Additional Question - Risk Management: Potential risks should be identified along with strategies to mitigate them, ensuring the campaign's adaptability to changing circumstances.

Risk Management Begins With Planning

Risk is an inevitable part of driving program evolution and acceleration of results. But with the crucial work of your mission on the line, it's important to approach risk with great intention and an agreed-upon risk tolerance.

Managing risk effectively begins with planning, program evolution, opportunity assessment, and real-time monitoring.

ONBOARDING

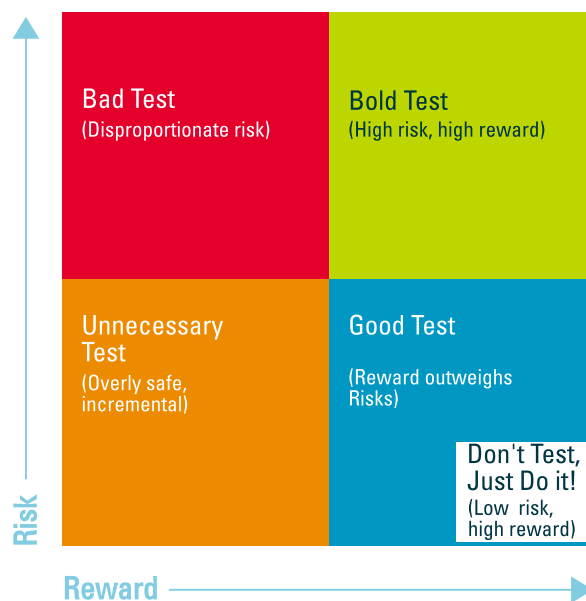
During the onboarding process, we will discuss your goals and desires for the growth and evolution of the program.

Then, we will have an open conversation around two key areas:

- **Risk Tolerance** — We will discuss your appetite for risk and work to understand your answers to questions like, *"Is there an appetite to establish an R&D budget to find new opportunities without the promise of a return?"*
- **Testing** — As we think about how we will approach testing for you, we will want to understand if you require incremental testing of every change or if you are comfortable with untested optimizations based on best practices. Then we can shift testing resources to efforts that have the potential to be needle movers.

ANNUAL PLANNING

After we have a better understanding of your philosophy around risk, we will begin our annual planning process. During this process, it is common for us to evaluate all new or substantial strategies on a risk-versus-reward scale, as outlined below.



This is something that would be presented to you during planning or, in some cases, even done together! This allows you to thoroughly understand the inherent risk you might be taking with the implementation or testing of new strategies. And conversely, it allows you to evaluate what might not be worth the energy or investment.

We understand that breaking reliance on a single fundraising channel can feel daunting. We will approach this transition methodically, ensuring a smooth and risk-managed shift. We won't recommend cutting direct mail cold turkey. Instead, we will evaluate the risks associated with each campaign and take measured steps toward diversifying channels.

Additional Question - Risk Management: Potential risks should be identified along with strategies to mitigate them, ensuring the campaign's adaptability to changing circumstances.

Assessing Risk in Campaign and Deciding When to Test

CAMPAIGN PLANNING & TESTING

While your appetite for risk will certainly inform our recommendations on when to test or not, generally speaking, we operate in the camp of focusing on testing things that can move the needle. We evaluate whether to recommend a test, abandon a test, or simply implement an optimization based on these three questions.

1. Why are we testing?

This may seem like an easy and obvious one. But the response to this question can be extremely telling. The #1 reason you should pursue a test is because you believe the strategic or tactical change can “move the needle” and improve performance.

Investment should be placed in testing opportunities that can be needle-movers. Full package tests; new offers or gift arrays; or significant changes to format, cadence, message, and creative can all be needle-movers. Incremental changes, however, are low risk and often result in neutral performance between a test and control package.

That said, there is one inversion of the “move the needle” rule: testing the impact of an uncontrollable change, like a logo or larger brand change that an organization may implement. In these cases, we would recommend testing not in the hopes of seeing a change in performance but rather in the hopes that you don’t.

Unfortunately, in a rebrand, there is no going back. So, in this instance, it is worth testing the rollout of the brand to understand if it negatively impacts performance in any way. These data points can then be used to inform future decisions, rollout plans, and budget projections.

2. What's your hypothesis?

All good tests need a hypothesis. This relates back to the belief that the test will improve performance.

Identifying the hypothesis in advance of testing can help ensure that the test ladders back to a program or campaign objective and has a direct correlation with a program metric. It also identifies the metrics against which you will determine success (or failure).

If a test does not have a hypothesis that can directly impact donor behavior, it’s probably not worth testing.

3. What if it wins?

Obviously, testing a package you aren’t willing — or can’t afford — to mail in the future is a wasted effort.

For all test campaigns that could result in a change to package costs, our team requests rollout costs which show the estimated costs for mailing the test package to the full audience if it were to win. Then we compare those costs to the costs of the control.

If the cost is less — great! If it wins, you have a new control.

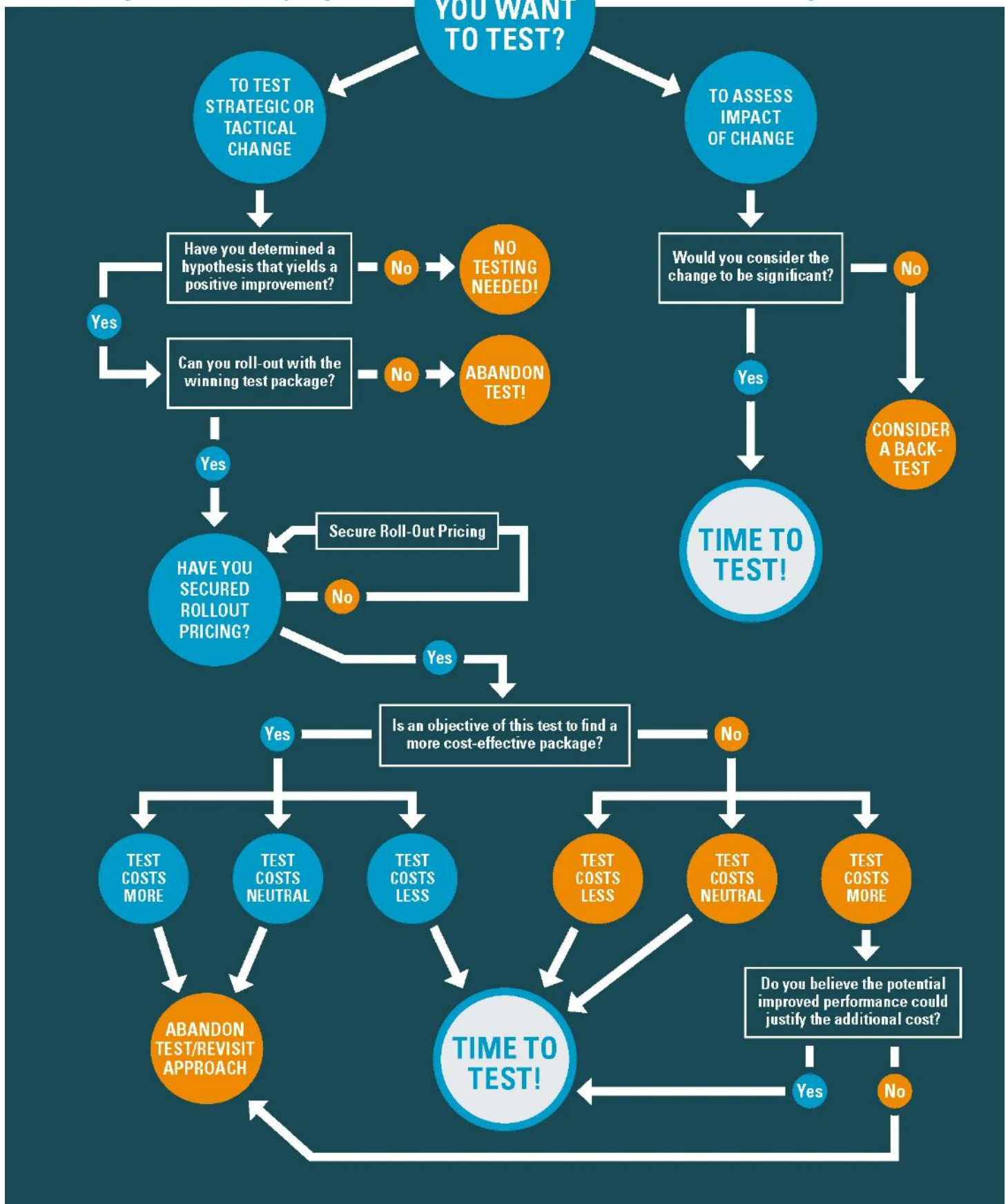
If the cost is neutral, then we ask ourselves if the test results met the objective. If so, then great again! (Of course, if the test was to reduce costs while maintaining or elevating performance, it’s back to the drawing board.)

If the cost is more, then we evaluate if the potential boost in performance is enough to offset the additional cost and still generate the desired outcome.

TESTING TO MITIGATE RISK. If you can identify why you are testing, you have created a hypothesis of how that test is going to better your program, and you have a clear plan for rolling it out to a larger audience if it wins, then you’ve got yourself a worthy test. See the next page for an example of this process.

Assessing Risk in Campaign...

... and Deciding When to Test



Additional Question - Risk Management: Potential risks should be identified along with strategies to mitigate them, ensuring the campaign's adaptability to changing circumstances.

Monitoring and Mitigating Risks in Execution

Across all channels, we continuously test, monitor, optimize, and adjust strategies and tactics to find the optimal mix of creative, messaging, and offers for your specific audiences. No campaign or plan is set-it-and-forget-it. Our media and strategy teams collaborate seamlessly with our creative teams, regularly reevaluating campaign and channel performance to make informed decisions. Our media SMEs continuously adjust budget allocations to ensure the right balance, achieving the best results aligned with campaign goals.

We ensure that your campaigns remains adaptable to changing circumstances, effectively managing risks and optimizing performance across multiple channels. Obviously, some channels allow for quicker reactions and adaptations than others.

One of the most nimble mediums are those in the digital advertising space. As an example, we observed that Ronald McDonald House Charities of North Central Illinois experienced declining revenue and search volume in their email and paid search efforts. To address this, we tested diversifying their digital media mix, incorporating YouTube, CTV, display, and paid social on Meta, NextDoor, and LinkedIn. With confirmation of low-risk positive performance and worthy investment, we modified their program to a full-funnel approach, targeting new audiences like local communities on NextDoor and professionals on LinkedIn, helped reverse the declining digital revenue by enhancing brand awareness and supporting paid search efforts.

These optimizations drove an immediate boost in performance and ultimately resulted in the metric improvements indicated below.

POST OPTIMIZATION RESULTS



89% Increase in ROAS



66% Increase in Average
Gift



12% Decrease in Cost per
Conversion



J. Service Categories



Our Most Powerful Service Offering: Our Business Model

TrueSense Marketing is still a privately owned marketing agency — rare in today's fundraising environment. We have grown both our tech and talent by investing in them ourselves, not by acquisition, private equity, or as a holding of a large multinational media conglomerate. Because we have chosen to grow in this manner, we can pursue innovation, technologies, and subject matter expertise without obligation to outside interests or competing internal P&Ls.

This means we never have to place your interests behind the needs of our business model.

It also means we can drive innovation and data-driven fundraising solutions across all channels and execute tactics in every phase of your program without ever leaving the TrueSense-controlled circle of data management, strategy, analysis, creation, production, and account service.

We call this *Full-Circle Fundraising*. It's a silo-free business model that holistically delivers the unique services appropriate to your specific needs. We built this model for one reason only: Our clients — and their missions — do not exist in silos, so neither should we.

A single, holistic toolbox of multichannel solutions...

- Annual Plan Development & Execution
- Donor Acquisition & Retention
- Strategic Consulting
- 1-, 3- and 5-Year Growth Planning
- Donor Health Index Reporting & Analytics
- Ongoing Performance Tracking & Campaign Reporting
- Media Planning & Buying: Digital & Postal
- Channel Integration: Direct Mail, Email, Telephone, Broadcast, Social & Search
- Creative Development: Design & Copy
- Print Production Management
- Audience Segmentation
- Predictive Modeling
- Monthly Sustainer Program Strategy & Execution
- Mid-Level Donor Program Strategy
- Pipeline Development for Major & Planned Gifts
- Telefundraising Services

J1. Full-Service Capabilities: Break down the agency's full-service offerings, detailing how each service category supports the overall strategy and contributes to meeting March of Dimes' objectives.

How Our Services Support the Strategies to Meet Your Goals



RESEARCH Leveraging Primary Donor Research

We'll begin by discovering who your donors are — and what's important to them. By researching your donor demographics and understanding what inspires them, we align your vision with their passions to foster stronger connections and more loyalty. An insight-driven approach like this will enhance your fundraising effectiveness and strengthen your relationship with your donors.



AI MODELING Multiply Your Data Power

The speed, depth, and accuracy of AI-powered predictive modeling help identify potential high-value supporters and enable us to understand what factors resonate with them. They also identify those unlikely to respond to a particular campaign. The result: more personalized, relevant communications with your donors that make their ongoing support more likely while ensuring the highest possible return on your investment.



STRATEGY Envision with Precision

A well-crafted fundraising strategy is indispensable for increasing support for your cause. It provides a roadmap for targeting potential donors, engaging them effectively, and nurturing lasting relationships. By setting clear goals and using data-driven insights, you can strengthen your ability to advance your mission and create a lasting impact in the world.



MEDIA Reaching Donors Where They Are

With captivating content across various channels, your nonprofit can showcase its impact and effectively convey the urgency of your cause. In a digital age, leveraging content creation and media services has become the cornerstone of successful fundraising that can increase your reach and influence.



STAFF EXPERTISE Strengthen Your Campaigns & Programs

Professionals steeped in decades of service to nonprofit organizations across a variety of disciplines not only provide expert guidance and program management but act as your internal champions advocating for you along the entire solution delivery path.



CHANNELS Amplify Your Multichannel Impact

By using different platforms — from email and social media to direct mail, CTV, and more — your organization can connect your donors across various demographics and preferences. This type of versatility enhances your outreach and engagement and fosters a sense of community and trust among your supporters.



CREATIVE Energize Your Powerful Content

Creativity can breathe life into your nonprofit's stories, helping your organization connect with supporters on a deeper, more emotional level. Plus, compelling offers, such as matching grants and exclusive incentives, can motivate your donors to give generously. Together, they create a sense of urgency and excitement around your fundraising campaigns — and mission.



ANALYTICS Drive Your Results Through Data

By analyzing your donor data and behaviors, your nonprofit can gain valuable insights into your supporter base. A data-driven approach helps to identify the most promising donor prospects, allowing for a more targeted and efficient outreach. Empower your cause with informed decisions that enable you to optimize your fundraising strategy by focusing on what works — and adjusting what doesn't.



PRODUCTION Deploy Omnichannel Campaigns

Having digital and print production campaign services in-house is your strategic advantage. This luxury not only gives you versatility and control over the creation and distribution of your fundraising materials, it also allows you to swiftly adapt to changing donor preferences and trends. Ultimately, it drives increased support for your nonprofit's important work.



K. References

K1. Client References: Provide contact information for at least three references, including a brief overview of the project scope, challenges addressed, and outcomes achieved.

References

We are proud of the company we keep, and our clients tell our story better than we ever could! Here are three references. We encourage you to speak to them about the impact we've had on their direct marketing and digital fundraising programs:



Help Heal Veterans
Therapeutic Craft Kits

Joe McClain
CEO
36585 Penfield Lane
Winchester, CA 92596
p 951.926.4500 | jsmcclain@healvets.org

Help Heal Veterans has been a client of TrueSense for the last six years. When the partnership began, the mail packages were freemium-heavy, and the value of the donor file was quite low. Over the years, we've been able to become more intentional with the audience targeting and prospecting and have successfully migrated their file away from blanket use of freemiums to just a few per year, bringing down package costs and maximizing return.



Dani Bozzini
Director of Marketing and Communications
114 Camp K9 Road
Ponte Vedra, FL 32801
p 904.686.1956 x108 | dbozzini@k9sforwarriors.org

K9s For Warriors has been a valued client of TrueSense since 2019. At the outset of our partnership, they had executed only a handful of direct mail campaigns and sought to expand their efforts in this area. With a small donor base and limited digital presence, they faced challenges such as the underperformance of separate direct mail campaigns and minimal engagement on digital and social media platforms. We initiated a test acquisition campaign to determine if their offer would resonate with prospects, employing various testing methods to identify a compelling offer for both prospects and donors. As we headed into 2022 and beyond, we successfully built their donor base, expanded their digital footprint, and generated significant revenue through a comprehensive multichannel approach.



RUTGERS UNIVERSITY
Foundation

Terence Bodak
Senior Director Digital Engagement, Constituent Programs
335 George Street, Suite 4000
New Brunswick, NJ 08901
p 848.932.1680 | terence.bodak@rutgersfoundation.org

TrueSense is fully an agency of record for Rutgers University Foundation, inclusive of support to the University as well as Rutgers Health. The partnership began three years ago and focused solely on the Cancer Institute, but expanded in the last year to the full Foundation. With this expansion, the Foundation challenged us to diversify their fundraising channels as well as determine the level of school-by-school customization necessary to drive results. TrueSense focused on operationalizing their program, taking full advantage of the capabilities within the email platform and data. Additionally, we've created engagement and donor customization opportunities leveraging Movable Ink with this client, as we are recommending for you.



L. Cultural Fit and Organizational Values

A few years ago, we decided to articulate what made us unique as an agency and what defined our purpose and culture. We determined that, to better serve our clients and ourselves, we needed universal strategic anchors to meet the needs of virtually every fundraising challenge.

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

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.

We plan to scale. In all our endeavors, we will seek the most effective fundraising strategies, data science, and creative solutions so that, once made operational, they can be leveraged cost-effectively for many.

I1. Values Alignment: Discuss how the agency's core values and culture align with March of Dimes, particularly in adapting to and leading through change in the nonprofit sector.

Our Core Values

Kinship. United by a shared purposes, we bring together experts from across varied fields, skill sets, perspectives, and parts of the world. TrueSense teammates can communicate honestly and disagree respectfully and are comfortable questioning assumptions and challenging viewpoints to generate deeper insights and stronger collaboration.

Ownership. Each of us has a stake in changing the world, and at TrueSense, we bring our passion and our dedication to work. We commit to our tasks, projects, and the organization because we know our work makes a difference.

Service. We bring honesty and integrity to our work through commitment, communication, and transparency. We stand alongside our clients and coworkers as true partners. We take every opportunity to immerse ourselves in our clients' missions, through our work as well as our giving, volunteering, and sponsorship.

How do these align with you in this time of change?

Kinship promotes honest, collaborative transparency and dialogue — dialogue that is an important requirement for true organizational change. As you pursue your shift from a channel-first to audience-first focus, candor and authenticity will be essential.

Ownership underpins accountability, which nourishes trust. By definition, change requires trust. As you fundamentally shift your program, you must be able to trust the counsel of your strategic partner, not only to base plans on deep experience and best practices but to deliver and own unvarnished outcomes, good and bad.

Service is the heavy lift of organizational change. Responsive, efficient, consistent. Therefore, we pursue service with an overriding sense of humility, eager to roll up our sleeves and get our hands dirty, regardless of our position in the organizational hierarchy.



3.1 Detailed Agency Information

Agencies need to provide a range of information about their company:

1. Legal name of Agency and the year it was founded.

Mailing Services of Pittsburgh, Inc. d/b/a TrueSense Marketing, Inc.,
founded 1958.

2. Tax Payer ID.

25-1202618

3. Dunn & Bradstreet Number.

05-552-8848

4. If a Corporation, when/where was the date of Incorporation.

Incorporated in Pennsylvania July 12, 1967.

5. If a Partnership, provide the names of the principals.

Not applicable.

6. What is the name of your organization's parent company, if any?

Not applicable.

7. Principal owners of the Agency and their percentage of ownership.

TrueSense is wholly owned by the Bushee family:

Richard Bushee - 29.9%

Steven Bushee - 29.9%

Sharon Bushee-Skender - 17.8%

Michele Bushee - 16.5%

Mark Bushee - 3.7%

Philip Bushee - 2.2%

8. Provide the location(s) all of your corporate offices.

Agency Headquarters: 502 Keystone Dr., Warrendale, PA 15086

Production facility: 21 Naus Way, Bloomsburg, PA 17815

9. How many employees do you have?

446 employees as of May 20, 2024.

10. Has your firm filed for bankruptcy within the past five years? If yes, provide details.

Mailing Services of Pittsburgh/ TrueSense Marketing has never filed for bankruptcy.

11. Describe any past, current, or pending litigation against your company.

We do not have any current or pending litigation, nor any recent past litigation.

12. What percentage of your clients are nonprofit organizations?

100% of agency clients are nonprofit organizations.

13. What is the annual sales volume of your company?

\$102,500,000

14. List your top five (5) major clients by sales volume.

In no particular order:

- Feed the Children
- Meals of Wheels America
- Ronald McDonald House Charities
- Help Heal Veterans
- The Salvation Army

15. What new clients have been added to your client roster in the past 12 months? 24 months?

12 months:

Over the last 12 months, TrueSense has acquired 18 new clients of various sizes and scales. 16 of these clients fall within our vertical models - Animal Welfare (6), Children's Hospitals (2), Food Banks (6), Meals on Wheels (1), and The Salvation Army (1). The other 2 new clients sit within the National Vertical - which would serve you. These clients are New York-Presbyterian Hospital and Braille Institute of America.

24 months:

In the 12 months prior, TrueSense welcomed 51 new clients. This influx was due in part to the acquisition of One & All described below. These 51 clients consisted of Animal Welfare (23), Children's Hospitals (1), Food Banks (14), National/Medical (3), Missions (7), The Salvation Army (1) and Ronald McDonald House Charities (2).

16. Describe any changes to your client list in the past 12 months? 24 months?

The most dramatic changes to our client list has come through the acquisition of One & All. In June of 2022, we had assumed a number of their clients that are served within shared verticals such as Food Banks, The Salvation Army Division and Corps, Rescue Missions, and Animal Welfares. This later paved the way to acquire all clients and staff from One & All in January of 2023. Some of the clients listed above for 13-24 months are as a result of these business changes while others were acquired as new business through traditional proposals.

Additional Question - Compliance and Privacy: It is essential for agencies to address how they will handle data privacy and regulatory compliance within their campaign executions. This will safeguard the integrity of donor data and ensure legal compliance.

Your Data Is Secure

At TrueSense, data fuels nearly everything we do for the clients we serve; in fact, our COMPASS data platform is central to the delivery of all of our data capabilities. Reliably accurate and consistent data is the key to ensuring campaigns are executed with up-to-date information and timely insights. These insights and data outputs are incorporated seamlessly so that we can nimbly react on your behalf.

We have worked incredibly hard over the last decade to build a secure data pipeline that syncs all your data assets to our environment on a regular basis. Everything from data file layouts, transfer schedules, and data mapping to our COMPASS platform is meticulously managed, including constituent contact and preference data, transaction history, communication business rules, campaign/promotional history, recurring gift commitments, and more.

Our most common method of data transfer for provisioned data is transmission via Secure FTP, which we manage. This assures data file encryption and keeps your data protected at all times. Data breaches are a very real threat, and we take safeguarding your data and your constituents' private information very seriously.

We undergo several audits annually to ensure data confidentiality, integrity, and availability with reputable auditing firms such as **Schneider Downs** and **TrustedSec**.

Our approach to security is layered, beginning with perimeter defense via industry-leading firewalls and intrusion prevention systems (IPS). Internally, we secure our network with intrusion detection systems (IDS) and 24x7x365 monitoring. All endpoints are secured and centrally managed via **CrowdStrike**, and multi-factor authentication is required to access any resource. We also invest greatly in education by requiring monthly security awareness training for all employees across the agency who have access to information systems.



**We are compliant
with SSAE16 and
HIPAA standards, and
we are SOC2 Type II
certified as well as
PCI-compliant.**



Thank you for your consideration. We look forward to talking more about ways we can partner to accelerate your omnichannel program.

If you have any additional questions, please contact:

Patrick Cassetti
Director of Business Development
m 412.526.1989
Patrick.Cassetti@TrueSense.com

