

# Program From the Ground Up



Presented by: Steve Maggio, President & Chief Executive Officer, DaVinci Direct, Inc.

# Direct Mail is Still King

- Direct mail still drives nearly 90% of revenue for most clients, in terms of individual giving
- It's the channel of choice for donors age 65+
- Channel integration is important as digital fundraising grows, and organizations strive to cultivate younger donors
- It's all about donor choice

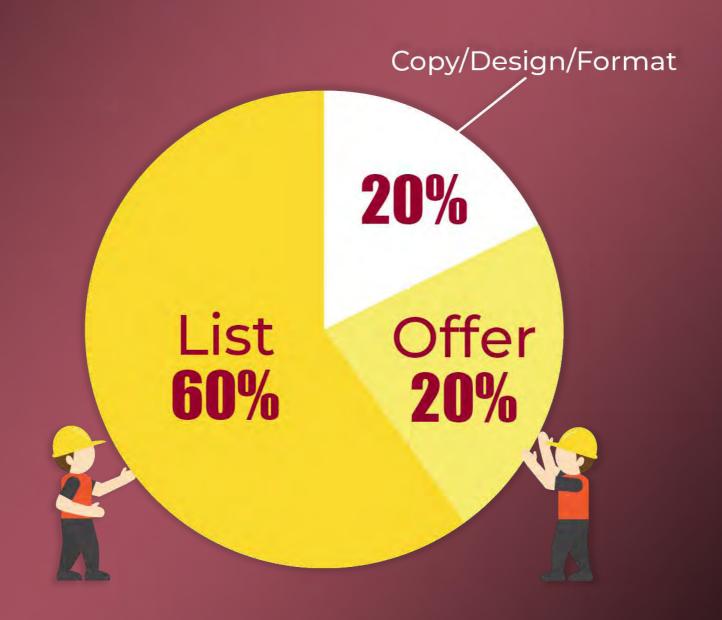
# How fast is digital growing?

#### Blackbaud's 2021 Charitable Giving Report:

- Overall giving grew 19% and online giving grew 42% since 2019. Organizations with fundraising programs hard-hit by COVID-19 showed resilience and a return to growth in 2021.
- 12% of total fundraising revenue came from online giving in 2021, down slightly from 13% in 2020
- 21% of online transactions were made via a mobile device
- 20.1% percent of total online giving took place in December
- Multichannel donors are the most valuable donors; integrating direct mail and email is a great way to drive up LTV in the current environment

# What drives response?

• List is most important, followed by offer and creative



# Finding your voice!

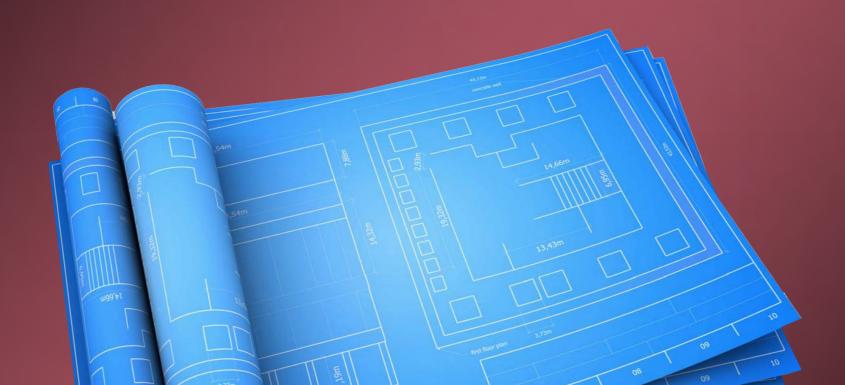
- Highlight your unique strengths and capabilities
- Use storytelling to engage people. Use emotion. People give with their heart more than their head!
- Present the reader with a problem that they can help solve
- Be "Donor-centric." Don't talk about why you're the greatest...





# Creating your Unique Blueprint

- Program planning
- List & media strategy
- Grateful Patient cultivation
- Integrating direct mail and digital messaging with your organization's overall marketing/communications strategy



# Acquiring New Donors

#### An expensive yet crucial investment

- Donor attrition of up to 30% per year is inevitable
- You must constantly replenish the file with new donors
- Grateful Patients are an essential component
- The goal is to add enough new donors each year to overcome attrition and grow the donor file
- Aim for a 1% response rate
- Most acquisition programs do not break even in Year 1 it's an investment that pays off when new donors give again.
   Typically, breakeven occurs between 24 – 36 months.

# **Building support of Grateful Patients**

#### A typical Grateful Patient Acquisition program

- Lists are pulled on a monthly basis, using certain suppression and wealth screening criteria to qualify prospects
- Grateful Patients are mailed quarterly, on a "rolling basis."
- Utilize Grateful Patient stories that have performed well in the renewal program
- Expectations matter: even "warm prospects" like Grateful Patients rarely generate more than a 1.00% response rate
- For some DaVinci healthcare clients, acquisition mailings with premiums, such as address labels, can pull 1.5 1.75%

# Overall Acquisition Best Practices



# Acquiring New Donors

#### Grateful Patients must be carefully cultivated

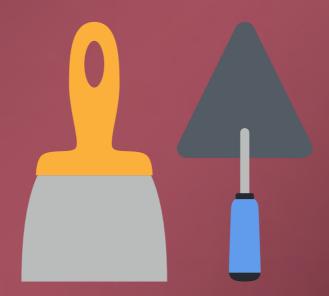
- Engage the entire organization. Make it part of your culture!
- Abide by HIPAA Privacy Rules, but use customization: demographics, health insurance status, department of service
- Include an "opt-out" in your direct mail package
- GP's represent a cost-free list of cultivated non-donors
- Performance is driven by several factors:
  - Recency: 0 3 months and 4 6 months most productive
  - Ability to give: Use predictive modeling
  - Inpatients generally perform better than outpatients over long term, but test outpatients of 0 3 months

# Acquiring New Donors

#### **Rented Lists**

- For many specialty hospitals Grateful Patient acquisition is augmented by rented lists
- We rent lists of donors who have made a gift to similar healthcare organizations within the last 12 months
- Larger organizations often invest in donor modeling and coops such as Target, Wiland, etc.
- Frequency and size of acquisition campaigns is a function of budget, but your attrition rate matters, too...
- The key question is: are you acquiring enough new donors to overcome attrition and grow the file from the ground up?

# Building Your Renewal Program



# Renewing & Upgrading Donors

#### Where your investment pays off!

- Most hospitals and healthcare clients mail frequently,
   8 10 or more times per year
- The cornerstones of most successful renewal programs include proven offers and themes such as Challenge Match, Annual Fund and Member or Supporter Drive
- Then, test unique mission-based appeals (e.g., Doctor's Day, Research Appeal, Technology Appeal) and see if they work
- While branded appeals form the foundation of many programs, straight story-based appeals round out the program

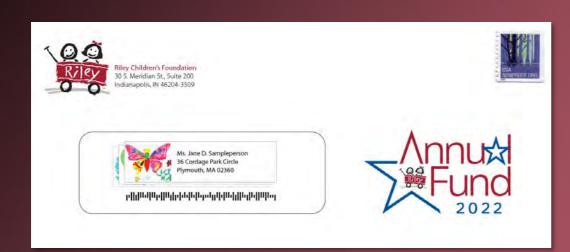
# Framing Offers with Branded Appeal Themes



#### Riley Children's Foundation — Annual Fund Logo



#### Riley Children's Foundation Annual Fund Acquisition Control







fore she was even born, Sophia

biggest smile and loves to have fun!

Today, Sophia has the

Before she was even born, Sophia faced open heart surgery.

Dear Friend.

March 2022

#### Every Hoosier baby deserves a healthy start to life.

Sometimes, pregnancy goes like clockwork. But the Stebings needed extra support to bring baby Sophia into the world safely.

The Thursday before Christmas, the experts at Riley Hospital for Children at Indiana University Health confirmed that baby Sophia would likely be born with Down syndrome and also have multiple heart defects that would require open heart surgery!

I know you'd have done all you could to help. Now, here's the good news.

#### The Riley Children's Foundation 2022 Annual Fund Drive is underway in (Donor Town)!

You may not realize it, but medical miracles happen every day at Riley Hospital. In fact, Riley Hospital for Children is consistently recognized by U.S. News & World Report as one of the nation's best children's hospitals. But there is so much more to the story.

(Ms. Sampleperson), it's the generosity of people like you that's been saving lives for almost 100 years here at Riley. Now, every day of the year, babies in need like Sophia count on the Riley community.

That's why I'm writing to you today with special urgency. I'm asking you to join Riley and help save more lives like Sophia's in 2022.

By sending your first gift of \$20, \$50, \$100 or more now—or your best possible donation—you'll help create more miracles.

You should know that the Annual Fund is one of our most important fundraising drives of the entire year. But it doesn't last long, so please act quickly.

You see, by joining today, you'll help Riley meet the staggering demand for our services. Last year, children visited Riley for hope and healing more than 320,000 times. You'll also support cutting-edge research because Riley is the only pediatric research hospital in Indiana.

(over, please)

Riley Children's Foundation • 30 S. Meridian St., Suite 200 • Indianapolis, IN 46204-3509



Riley Children's Foundation P.O. Box 1787 Indianapolis, IN 46206-1787

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YES! Hoosier children like Sophia deserve to have the best care close to home. So I'm joining the caring community of Riley supporters today, and enclosing my first Annual Fund gift of:



□\$XX □\$XXX □ Other\$



Ms. Jane D. Sampleperson 36 Cordage Park Circle Plymouth, MA 02360

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P.O. Box 1787 Indianapolis, IN 46206-1787

M3A22 DETACH AT PERFORATION



(DONOR CITY) DRIVE

I want to do more! Please see reverse side to learn about monthly giving.

> To give online go to RileyKids.org/Sophia22

Please make your check payable to Riley Children's Foundation. All personal information will remain confidential. Thank you!





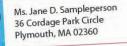
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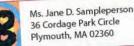
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Plymouth, MA 02360

Ms. Jane D. Sampleperson

36 Cordage Park Circle

Plymouth, MA 02360

Sampleperson

Family

#### **Method of Payment**

☐ My check made payable to Riley Children's Foundation is enclosed.

To make your gift by credit card, go online to RileyKids.org/Sophia22 or call 317-759-6906.

# Join the Riley Heroes Monthly Sustainer Program!



Please consider joining us as a monthly sustainer today. As a member of Riley Heroes, giving is fast and easy because you sign up once and everything is automatic. You don't have to write checks or go online to give. Your donation goes directly to our lifesaving work!

To join, please visit RileyKids.org/Sophia22 and select donate monthly. You can also call 317-759-6906 to make your donation by telephone.

# Riley is One of the Nation's Best Children's Hospitals

Ranks in nine specialties nationally; Remains the only children's hospital ranked in Indiana

#### Meet the Artists

The beautiful artwork featured in these name and address labels was created by Riley Hospital patients. These children face a wide variety of medical challenges, but they are united by one common source of hope and healing: Riley Hospital for Children at Indiana University Health.

As you use these name and address labels for your personal mailings, please remember it is only through the generous contributions of our friends that we are able to fulfill our mission to ensure children have access to exceptional healthcare. Thank you!



LAYLA CUNNINGHAM Layla was diagnosed with a brain tumor when she was 4 years old, kidney cancer when she was 10 and thyroid cancer when she was 15. Today she is cancer-free and doing well. Layla loves to sing, dance and make other people happy by drawing cards for them.



CAROLINE PATTILLO In June 2016, Caroline suffered extensive internal injuries from a boating accident. She was air lifted to Riley Hospital for Children, where Matthew Landman, M.D., and his team were awaiting her arrival in the trauma center. Caroline healed in record time and is a vibrant girl who plays multiple sports and loves to explore.



LUKE GILBERG Luke had a prenatal diagnosis of fluid on his brain and needed surgery to connect his esophagus to his stomach. He loves playing super heroes and being outside. When he hears someone talk about Riley Hospital for Children he says, "That's my hospital."



OZZY REYHER

Ozzy was born with a congenital heart defect called transposition of the great vessels. At only 48 hours old, he needed life-saving openheart surgery at Riley Hospital for Children. Ozzy had a stormy post-operative period, but is doing great today. He is very active and loves sports.

#### Riley Children's Foundation Acquisition Double Buck Slip Test





Ms. Jane Sampleperson DaVinci Direct 36 Cordage Park Circle Plymouth, MA 02360 Manddallallalladladladladladlaald



#### YES! I want to help more kids like Sophia!

For continued excellence in patient care, lifesaving research, and family programs—here is my best Annual Fund gift of:

☐ \$50 ☐ \$100

☐ Other \$

I want to do more! Please see reverse side to learn about monthly giving.

Ms. Jane Sampleperson DaVinci Direct 36 Cordage Park Circle Plymouth, MA 02360 Mandalallallalladladladladladla

Thank you! Your gift is tax-deductible to the full extent of the law All personal information that you provide will remain confid

Dear Ms. Sampleperson,

M3A22



To give online go to RileyKids.org/Sophia22



Riley Children's Foundation

March 2022

Every Hoosier baby deserves a healthy start to life.

Sometimes, pregnancy goes like clockwork. But the Stebing family needed extra support to bring Sophia into the world safely. An ultrasound showed Sophia would be born with Down syndrome and would need open heart surgery! I know you'd have done all you could to help. Now, here's the good news.

#### The Riley Children's Foundation 2022 Annual Fund Drive is underway in (Donor Town)!

You may not realize it, but medical miracles happen every day at Riley Hospital for Children at Indiana University Health—the only pediatric research hospital in Indiana! In fact, we're consistently recognized by U.S. News & World Report as one of the nation's best children's hospitals. But there is more to the story.

(Ms. Sampleperson), it's the generosity of people like you that's been saving lives for almost 100 years here at Riley. That's why I'm urging you to join the Riley family, and send your first Annual Fund gift of \$20, \$50, \$100 - or your best possible gift - to support Riley's lifesaving work.

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(over, please)

#### pport the Best!

ital for Children at Indiana Health was distinguished idiana's only nationally ildren's hospital in the U.S. orld Report 2021-22 "Best s Hospitals" report.

lelps Riley recruit and ld-class physicians and roundbreaking pediatric search.

nks for supporting children's hospital!

ices. Last year, children itting-edge research and new at Riley Children's Health. ecialists who developed a to undergo heart surgery!

ng-and she has been courageous Riley patients.

Mom Jessica adds, "Our family has big dreams for Sophia! We are so grateful to Riley Hospital."



Riley Children's Foundation P.O. Box 1787 Indianapolis, IN 46206-1787

Elizabeth A. Elkas, President and CEO, Riley Children's Foundation

P.S. Remember! Our 2022 Annual Fund Drive is officially underway. Your gift matters because this is one of our most important fundraisers of the year. Please help Riley start a new year strong by sending your first Annual Fund gift. Welcome to the family.

#### Riley Children's Foundation Annual Fund Renewal





"Our daughter has hope because of Riley—and you."

-Jessica Stebing, Sophia's Mom







Month XX, 2022

Ms. Jane D. Sampleperson DaVinci Direct 36 Cordage Park Circle, Suite 339 Plymouth, MA 02360-0000 Ilmdolalladdaladdaladdaladdaladd



Before she was even born, Sophia faced open heart surgery.



Today, Sophia has the

biggest smile and

Dear Ms. Sampleperson,

Like every expectant mom, Jessica had big dreams for her soon-to-be-born baby girl, Sophia. Then a routine ultrasound turned her joy into fear.

She and her husband rushed to Riley Hospital for Children at Indiana University Health.

The Thursday before Christmas, the experts at the Riley Fetal Center confirmed that Sophia had a 99% chance of being born with Down syndrome. Then an echocardiogram showed Sophia also had multiple heart defects and would eventually need open heart surgery.

Like so many children who come through Riley Hospital's doors, Sophia, and her parents, needed every ounce of hope and support caring people like you could send their way.

(Mrs. Sampleperson), I wanted to share Sophia's story with you today because you know what it takes to save a life. Your incredible compassion and generosity have helped to build one of the nation's leading pediatric healthcare networks.

For almost 100 years, Riley Hospital for Children has been able to open its doors to the sickest children and smallest patients for one reason—a community of caring like no other.

Your dedication is an inspiration. That's why I'm confident you'll be pleased to learn that our 2022 Annual Fund Drive is now underway in (Donor City)!

This is your chance to help us start the year strong. So please send your most generous gift of \$PG, \$UP1, \$UP2 or more as soon as you can.

The Annual Fund is one of our most important fundraising drives of the entire year. Yet, it doesn't last long. As a good friend of Riley, you've been a part of so many wonderful stories like Sophia's. But I believe you'll find the loving ending of this story as special as I did.

Because the Riley community has made a commitment to excellence in child healthcare in the

(over, please)

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Riley Children's Foundation P.O. Box 1787 Indianapolis, IN 46206-1787

#### Riley Children's Foundation Annual Fund Follow-up





#### **URGENT REMINDER:** Last Chance to Help!

Ms. Jane D. Sampleperson DaVinci Direct 36 Cordage Park Circle, Suite 339 Plymouth, MA 02360-0000







Ms. Jane D. Sampleperson DaVinci Direct 36 Cordage Park Circle, Suite 339 Plymouth, MA 02360-0000 Ilmdulullahdahdahdahdallahdal



"Because of your generosity, we were able to take our baby home." — Sophia's Mom, Jessica

March XX, 2022

Dear Ms. Sampleperson,

#### Time is running out for the Riley 2022 Annual Fund!

A few weeks ago, I sent a letter to let you know our annual drive was officially underway in (Donor City). Today, I'm writing with a gentle reminder that this appeal is one of our most important fundraisers of the year.

That's why I urge you to renew your past gift of \$PG—or perhaps increase it to \$UP1 or even \$UP2 or more—to help save lives at Riley Hospital for Children at Indiana University Health.

You may recall Sophia's story from my last letter. Born with Down syndrome and multiple heart defects, this Riley Junior Champion is a true fighter. Thanks to loyal support like yours, she is thriving after undergoing a delicate open heart surgery. Today she's happy, healthy—and has started taking her first steps.

That's the lifesaving and life-changing impact your gift has, You'll help fund research breakthroughs and provide some of the best pediatric patient care in the nation. You can do all of it—but only if you act quickly. Thank you.

Sincerely yours,

Elizabeth A. Elkas President and CEO Riley Children's Foundation

P.S. PLEASE REMEMBER: This is my last chance to contact you before our 2022 Annual Fund closes. Please send your best gift. If your gift and this letter have crossed in the mail, please excuse this reminder and accept my heartfelt thanks.

Your Gift Starts Here!

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#### **UPMC** — Breast Cancer Appeal Logo



#### **UPMC** — Breast Cancer Appeal





36 Cordage Park Circle Plymouth, MA 02360-0000

Mrs. Jane D. Sampleperson

36 Cordage Park Circle

Mrs. Jane D. Sampleperson

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Mrs. Jane D. Sampleper

DaVinci Direct 36 Cordage Park Circle Plymouth, MA 02360-0000



Your generous support helped Dr. Emens's breast create hone Your gift today will create even more



September 2021

Dear Friend.

You probably know that October is Breast Cancer Awareness Month. Your generous support for cancer research helped to create these Facts of Hope:

- . Though breast cancer is still the most common deadly cancer for women, we have made
- · Fewer women lose their lives to breast cancer than 20 years ago.
- The progress came from research conducted at places like UPMC Hillman Cancer Center.
- · We are still making new lifesaving discoveries all the time (read below).
- . Your ongoing support of cancer research creates even more hope!

As we begin our Breast Cancer Appeal, I wanted to share with you these truths about breast cancer and our progress, so you can help spread the hope.

We are winning, but we have a long way to go before everyone is safe. More than 280,000 American women will face a breast cancer diagnosis this year alone!

That's why I also want to show how your ongoing support for cancer research at UPMC Hillman Cancer Center can save even more lives

> You've been so generous before. Please support our Breast Cancer Appeal today to help loved ones and neighbors who are fighting for their lives.

Thanks to the support of people like you, UPMC Hillman Cancer Center has become world leader in using the body's own immune system to fight cancer.

You may remember me mentioning the groundbreaking work of Dr. Leisha Emens in my past letters. Dr. Emens is internationally known for her research on breast cancer immunotherapy; she has found new ways to combine immunotherapy and traditional breast cancer chemotherapy to

Her team has shown that these combinations increase the survival of women with triple negative breast cancer - one of the most difficult types to treat.

(over, please)

PLEASE RUSH!



**IIPMC Hillman Cancer Center** Gift Processing Department 200 Lothrop Street Pittsburgh, PA 15213-2536

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our understanding of the

#### BREAST Support Cancer Research and Save Lives! CANCER YES! I'll support the 2021 Breast Cancer Appeal. Enclosed is my best gift of: APPEAL □\$XX □\$XX □\$YY Other \$\_ □ \$ZZ Please use my gift for: ☐ Research (check payable to University of Pittsburgh) ☐ Patient Care (check payable to UPMC) Mrs. Jane D. Sampleperson ☐ I prefer to give by credit card (see reverse side) and Mr. John D. Sampleperson DaVinci Direct Make your gift now at 36 Cordage Park Circle https://hillmanresearch.upmc.edu/giving/ Plymouth, MA 02360-0000 or call 412-623-4700. թիլիովութիոլիգեփերգորիրութիրդերիոր XXXXXXXXX XXXXXXXXX UPMC HILLMAN CANCER CENTER SISO Centre Ave., Suite 18 pittsburgh, PA 15232-1309 ▼ DETACH AT PERFORATION ▼ Mrs. Jane D. Sampleperson Mrs. Jane D. Sampleperson DaVinci Direct 36 Cordage Park Circle DaVinci Direct Plymouth, MA 02360-0000 36 Cordage Park Circle Plymouth, MA 02360-0000 Mrs. Jane D. Sampleperson DaVinci Direct 36 Cordage Park Circle Mrs. Jane D. Sampleperson DaVinci Direct 36 Cordage Park Circle Plymouth, MA 02360-0000 DaVinci Direct Plymouth, MA 02360-0000 36 Cordage Park Circle Plymouth, MA 02360-0000 Mrs. Jane D. Sampleperson Mrs. Jane D. Samplepersor DaVinci Direct 36 Cordage Park Circle Mrs. Jane D. Sampleperson DaVinci Direct Plymouth, MA 02360-0000 36 Cordage Park Circle S DaVinci Direct Plymouth, MA 02360-0000 36 Cordage Park Circle Plymouth, MA 02360-0000 Mrs. Jane D. Sampleperson DaVinci Direct 36 Cordage Park Circle Plymouth, MA 02360-0000 Mrs. Jane D. Sampleperson DaVinci Direct 36 Cordage Park Circle DaVinci Direct Plymouth, MA 02360-0000 36 Cordage Park Circle Plymouth, MA 02360-0000 Mrs. Jane D. Sampleperson 36 Cordage Park Circle Mrs. Jane D. Sampleperson Plymouth, MA 02360-0000 DaVinci Direct 36 Cordage Park Circle Plymouth, MA 02360-0000 Mrs. Jane D. Sampleperson Mrs. Jane D. Sampleperson DaVinci Direct 36 Cordage Park Circle Mrs. Jane D. Sampleperson DaVinci Direct Plymouth, MA 02360-0000 36 Cordage Park Circle DaVinci Direct Plymouth, MA 02360-0000 36 Cordage Park Circle Plymouth, MA 02360-0000 Mrs. Jane D. Sampleperson Mrs. Jane D. Sampleperson DaVinci Direct 36 Cordage Park Circle Mrs. Jane D. Sampleperson DaVinci Direct 36 Cordage Park Circle Plymouth, MA 02360-0000 DaVinci Direct Plymouth, MA 02360-0000 36 Cordage Park Circle Plymouth, MA 02360-0000 Mrs. Jane D. Sampleperson

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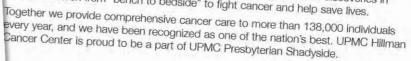
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Double your donation by applying for matching funds from your employer. Call your human resources office to find out if Make your gift now at https://hillmanresearch.upmc.edu/giving/



## Support a world leader in cancer research and care!

Internationally recognized for its leadership in the prevention, detection, diagnosis and treatment of cancer, UPMC Hillman Cancer Center is one of the largest integrated community cancer networks in the United States. As the preeminent institution in western Pennsylvania for the delivery of cancer care; for the performance of basic, translational and clinical research; and for the education of the next generation of cancer researchers and physicians; UPMC Hillman Cancer Center is uniquely qualified to standardize best-practices cancer treatments to bring the latest discoveries in cancer research from "bench to bedside" to fight cancer and help save lives.





There are more than 443 active clinical trials at the UPMC Hillman Cancer Center. Cancer research and clinical trials have made many cures for cancer possible

#### Nore research and better care equals more survivors.



The fight against cancer begins with research into new drugs, treatment options and therapies to prevent and treat this deadly disease. That's why a primary focus of the UPMC Hillman Cancer Center is on clinical trials to increase our understanding of the disease and test every promising new project that has the potential to save lives. With 443 clinical trials currently under way, we are leading

the way to new breakthroughs and potential cures, enabling people with cancer to live longer, healthier lives.

To make a secure online donation to fund clinical trials and breakthrough cancer research, please visit https://hillmanresearch.upmc.edu/ giving/ today.

## network brings the best cancer care close to home.

know that approximately 80,240 Pennsylvania residents will be d with cancer this year? Another 71,850 people in Ohio will learn cancer, plus 12,380 in West Virginia.

ing 1.8 million Americans will hear the heartbreaking news that cancer, across all 50 states this year

**UPMC Cancer Center Network** 



Plymouth, MA 02360-0000

Mrs. Jane D. Sampleperson

DaVinci Direct 36 Cordage Park Circle

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**DaVinci Direct** 36 Cordage Park Circle

36 Cordage Park Circle

Mrs. Jane D. Sampleperson

Plymouth, MA 02360-0000

#### **UPMC** — Breast Cancer Appeal Emails





#### New research = New Hope in the fight against Breast Cancer

Dear << Mrs. Walsh>>

October is Breast Cancer Awareness Month and I'm pleased to report that your generous support for cancer research helped pave the way for us to be able to offer these Facts of Hope:

- · Though breast cancer is still the most common deadly cancer for
- women, we have made remarkable progress.

   Far fewer women lose their lives to breast cancer today than 20 years ago.
- · This progress is the result of research conducted at places like
- UPMC Hillman Cancer Center.

   We are still making new lifesaving discoveries all the time
- . Your ongoing support of cancer research allows us to offer even

As we launch our 2021 Breast Cancer Appeal, I share with you these truths about our progress, so that you can help spread the hope. We are winning, but we still have a long way to go. More than 280,000 American women will face a breast cancer diagnosis this year.

#### Your Gift Saves Lives

Your gift to our Breast Cancer Appeal today will support lifesaving initiatives like the groundbreaking work of Dr. Leisha Emens, who is internationally known for her research on breast cancer immunotherapy. She has found new ways to combine immunotherapy and traditional breast cancer chemotherapy to save lives!

Her team has shown that these combinations increase the survival of women with triple negative breast cancer - one of the most difficult types to treat. This is wonderful news, but there is much more work to do. That's why your ongoing support is so vital! Please send a gift today to help search and save lives. Thank you!

Robert L. Ferris, MD. PhD. Director, UPMC Hillman Cancer Center









Your support helped saved two lives ...



Three women in Jackie's family had been diagnosed with breast cancer, so she did the smart thing, and asked her doctor about early detection

Tests showed Jackie had one of the variants of the BRCA1 and BRCA2 genes that signify high risk for breast cancer. So her doctor recomm a mammogram twice a year. And year after year, she was fine. And then

Two years ago, the mammogram showed a tumor in one breast. To make things more complicated, Jackie was eight weeks pregnant. But the great thing about early detection for breast cancer and other cancers is that it increases the options for treatment

#### Your Gift Saves Lives

And thanks to your support, UPMC Hillman Cancer Center has the advanced capabilities to offer many different treatment options for our patients. By carefully timing and tailoring Jackie's treatment, we were able to cure her of cancer and protect her baby at the same time. Baby Mariana was born a little early, but otherwise perfectly healthy.

are able to offer this kind of state-of-the-art treatment close to home for our

Combined with early detection, it can make all the difference. Please continue your support today so we can offer all the options for advanced lifesaving treatment. Your gift helps people who are fighting for their lives today, and helps find new treatments for tomorrow. Thank you!

Sincerely

Robert L. Ferris MD. PhD.

P.S. Please be sure to ask your doctor about cancer screenings for you and all the people you love. And please make a cift today to continue your support for research and treatment at UPMC Hillman Cancer Center to save



Why our Breast Cancer Appeal matters... UPMC HILLMAN CANCER CENTER Research Patient Care



#### Early screening can save a life!

Dear <<Mrs. Walsh>>

You know that expression "You had one job?" During Breast Cancer Awareness Month, you and I have one BIG job; to remind people about

We need to make sure every woman knows to do self-screening monthly, doctor's office screenings yearly, and regular mammograms when

Thanks to your support for cancer research, we can treat and cure most cases of breast cancer, when caught before it's too late

And I know I said you and I have one job this month, but really, we have two. Our second job is to make this year's Breast Cancer Appeal our best ever. Your gift today can help do that.

Research

**Patient Care** 

Our Breast Cancer Anneal helps us continue to find new ways to screen for breast cancer in its earliest, most curable stages. Your gift will help fund research to find even better treatments for breast cancer. And you'll help provide the most advanced treatments to loved ones, neighbors, and friends who are fighting for their lives right now.

Please do all you can during Breast Cancer Awareness Month to spread the word about screenings. And please make your most of lifesaving gift to our Breast Cancer Appeal. Thank you!

Robert L. Ferris, MD, PhD

Director, UPMC Hillman Cancer Center

P.S. Your gift helps make sure we have the most advanced screening technology for our neighbors. Please con and treatment at UPMC Hillman Cancer Center to save lives. Thank you!

Research Patient Care







When Breast Cancer Threatens Everything UPMC HILLMAN CANCER CENTER Research Patient Care



#### Flying First Class for **Breast Cancer Treatment ...**

Dear << Mrs. Walsh>>

Barbie Barnes can tell you, better than I can, why it's so important for you to support UPMC Hillman Cancer Center during Breast Cancer Awareness Month. She was diagnosed with breast cancer as a young mother, at age 27.

"I think it would've been a lot harder if I didn't love the nurses at the cancer center," Barbie explains. "They pamper you. They have heated massage chairs, and it feels like you're flying first class. I'm incredibly grateful to the cancer center for a lot of reasons. For one thing, everything is in the same place, which made it a lot easier for me. The staff is incredible. When I was hospitalized after one of my chemo treatments — when my body was just breaking - my doctor came to visit me every morning before he went to work. It really helped me get through emotionally. I don't think it would've been the same if I went anywhere else."

This is what it means to donate to cancer research and treatment at LIPMC. It means we have one of the most advanced and most caring treatment centers in the world right here in our region to save the lives of the people we love

Research Patient Care

Please help us continue to be the place loved ones can turn to in the face Cancer Appeal, Thank you!

Robert L. Ferris, MD. PhD Director, UPMC Hillman Cancer Center

P.S. "Flying first class" in cancer care means advanced care that saves your life, in a place that treats you like a family member. Your support makes those two things possible. Thank you!

Give to

Research Patient Care

UPMC HILLMAN CANCER CENTER







#### Dayton Children's Hospital — Supporter Drive Card



#### Dayton Children's Hospital — Supporter Drive Appeal



dayton Dayton Children's Hospital

#### Emma is alive and well today.... Your support was a GAME-CHANGER!

Ms. Jane D. Sampleperson DaVinci Direct 36 Cordage Park Circle, Suite 339 Plymouth, MA 02360-0000 Handalalladdaladdaladdaladaladal





Since YEAR



#### 2022 SUPPORTER DRIVE

PLEASE YES! I'll help provide care and compassion to children and teens, and their families will be and their families. and their families, with my 2022 Supporter Drive contribution of: RUSH!

#### □ \$XX □ \$YY □ \$ZZ □ Other \$

☐ Yesl I'd like to make this a recurring monthly gift. ☐ I have enclosed a check made payable to Dayton Children's Hospital Foundation.

☐ Please charge my gift to my credit card. (see reverse) our last gift was <\$LG> on <LGDate>. Reflects giving to the Foundation through X/XX/XX.

dayton Dayton Children's Hospital children's Dayton, Ohio 45404-1815

To donate online, visit childrensdayton.org/22supporter

Ms. Jane D. Sampleperson 36 Cordage Park Circle, Suite 339 Plymouth, MA 02360-0000 Donor ID/DMR91/Segment Code

Please send me updates by email at:

For more information on any of these program please contact the foundation office at 937-641-3405 or getinvolved@childrensdayton.org.



March 2022

Ms. Jane D. Sampleperson DaVinci Direct 36 Cordage Park Circle, Suite 339 Plymouth, MA 02360-0000 Hardalalladdalalddalalalalalalal



#### Dear Ms. Sampleperson,

You never would have known what Emma was going through. Even her parents didn't know how she was struggling. By the age of 17, she had spent nearly half her life as a competitive gymnast. When the troubles came - the black spots in her vision, the dizziness, the sudden spikes in her heart rate she never told anyone, even her parents. She suffered more and more gymnastics injuries, but she kept pushing through.

It all took its toll. Physically, mentally, emotionally ... bit by bit, she was exhausted. Finally Emma's stamina ran out. She lost hope. In the midst of the pandemic quarantine - in the depths of her despair she tried to end it all

Emma's suicide attempt resulted in being admitted to an inpatient mental health unit, and she was eventually brought to us. Our team soon realized that Emma had an array of issues - and there was a missing link, somewhere.

The mystery had to be solved to prevent a lifetime of struggles for Emma.

You gave her the care she needed, SMr. and Mrs. Sampleperson. Your support for Dayton Children's Hospital moved this high-potential young woman from despair to hope. Today, she's like a different person ... healthy, vibrant, successful.

It's for children and teens like Emma that I bring you my thanks today, and I'm delighted to send you your personal 2022 Dayton Children's Hospital Supporter Card. Linvite you to carry it as a reminder of the difference you're making in the lives of so many like Emma.

But there are so many other children and teens in need - I hope you'll give again, to help them the way you helped her. Would you please renew your support for Dayton Children's Hospital today? Your gift of \$PG, or \$UP1 - maybe even \$UP2 or more - will change a young person's life. The reality is that your participation in our 2022 Supporter Drive in (Donor City) today may even save a life.

One Children's Plaza | Dayton, Ohio 45404-1815 937-64)-3000 | childrenidaylon.org/22supporter

#### dayton children's

**Dayton Children's Hospital Foundation** One Children's Plaza Dayton, OH 45404-1815

#### Riley Children's Foundation Holiday Challenge Match Logo



#### Riley Children's Foundation Challenge Match Integrated Campaign





Double the Healing Power of Your Gift Challenge











#### Riley Children's Foundation Holiday Challenge Match Lightbox







#### Riley Children's Foundation Challenge Match Integrated Campaign Email



# Constructing a Testing Plan

#### What to test? Everything!

- Start with "branded appeal themes"
- Make a strong commitment to testing:
  - List
     Offer
     Copy
     Design
     Format

- Timing Postage Gift Arrays Media Mix

- Data overlays
   Predictive Models
- Measure the success of each test by comparing it to established controls



# Segmenting Your Donor File

#### Crafting unique versions for each segment

- Remember, list is 60% of your success!
- Your don't want to speak to a \$25 donor, a \$250 donor and \$2,500 donor in exactly the same way
- RFM (*Recency, Frequency, Monetary*) is the most basic segmentation strategy
- Larger programs gain efficiencies using data models and scoring

# Examples of Special Messaging

#### Employ variable copy or formats for:

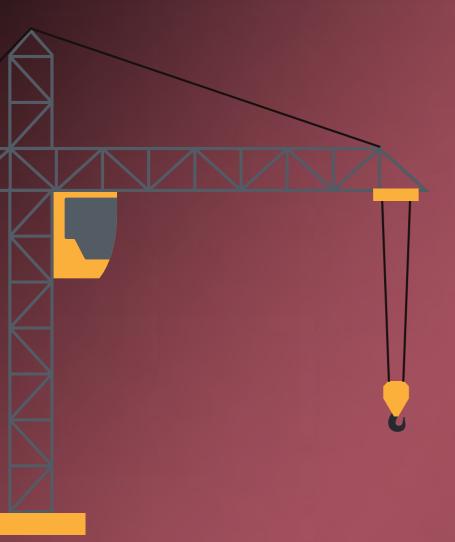
- Major Donors
- Monthly Donors
- Pre-lapsing and recently Lapsed Donors
- High-Value Long Lapsed Donors
- Planned Giving Prospects
- Memorial/Tribute Donors
- P2P and Special Event Donors
- Multichannel Donors

# Leveraging Your DR Program

#### It's an important feeder pool for:

- Major Giving Program
- Planned Giving 1 in every 200 new donors is likely to become a Planned Giving donor
- Capital Campaigns

# Upgrading Donors to Higher Giving Levels and Recapturing Lapsed Donors



# Upgrading Donors

#### To Higher Giving Levels

- Identify the \$1,000+ donor as a member of a special group of donors that take a leadership role in your work
- These societies have exclusive branding, including logos, special messaging and upscale production values
- Tiered levels with benefits promote donor upgrading
- Donors at \$1,000+ are automatically welcomed into the society;
   donors at \$500-\$999 are invited to upgrade to join
- Not every package has to be a special format; tailored "leadership track" messaging can be accomplished with versioning that refers to their membership status in each appeal

## **Lupus Foundation of America** — Partners in Progress





Mr. & Mrs. John Sampleperson Davinci Direct 36 Cordage Park Circle Plymouth, Will 02360

RSVP



Enclosed is my donation of:

Are you, or is a loved one living with lupus? (Please check all that apply.)

advancement of lupus research and care.

☐ Self ☐ Spouse ☐ Parent ☐ Child

Mr. & Mrs. John Sampleperson DaVinci Direct Plymouth, MA 02360 XXXXXX XXXX

Help Us Solve The Cruel Mystery LU?US

2121 K Street, NW, Suite 200

82% Program Services

dollar goes to vital programs!



arch studies and fellowships to ivers the greatest impact in the trategic approach focuses on ed most. For 40 years we have through in lupus research.

e future to fight for more ith lupus deserve better to do our part. We're Dr. Sam Lim, Emory University





Dear Mr. and Mrs. Sampleperson,

With your help, our transformation of lupus research is succeeding.

The pipeline of lupus studies is flowing at an exciting pace, bringing great new treatments, and moving us closer to a life free of lupus, thanks to the wonderful generosity and leadership of loyal friends like you.

Lupkynis , just approved by the FDA, is a prime example. You'll be glad to know this amazing new drug could change the lives of people with a very serious form of lupus, lupus nephritis - perhaps even someone close to you! The new drug improves kidney function significantly by reducing the inflammation that could lead to kidney failure, even death.

This and other recent breakthroughs raise the hopes of the estimated 1.5 million Americans affected by lupus and prove that our revolutionary strategy of targeting research obstacles in order to accelerate results is a

But lupus research, as you're well aware, cannot move forward on sheer momentum. Research that turns hope into reality is costly. From microscope slides and complex machinery to gathering the world's most brilliant minds, progress in finding new treatments and creating a world without lupus depends on your generosity.

You've been so generous in the past and I am deeply grateful for your support. Your past gift makes you a member of our "Partners in Progress" - a group of valued donors who play a leadership role in support of the Lupus Foundation of America.

Your renewal gift as a member of Partners in Progress can fund the next great breakthrough, so please be as generous as you can.

As you may know, an autoimmune disease causes symptoms when your immune system is out of balance and cannot tell the difference between healthy cells and foreign invaders, often triggering major inflammation.

The new drug works by suppressing a protein in the immune system that overreacted and inflamed the kidneys so they can't purify the blood, a vital task. It reduces inflammation significantly to save someone with lupus nephritis from symptoms of weakness, swelling, nausea, mental decline, and worse - requiring dialysis or a transplant.

(over, please)



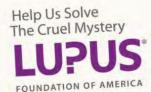












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(over, please)





This treatment — the culmination of research supported by the Lupus Foundation of America and friends like you — heralds a cascade of new of lupus research.

We need your ongoing leadership and support as a member of our Partners in Progress to keep this new momentum going, to continue this progress you've helped to start.

You know the Lupus Foundation of America is a world leader in lupus research. For more han 40 years, we have supported studies leading to EVERY research breakthrough.

That's why I urge you to renew your support, to help the Lupus Foundation of merica at a pivotal moment.

We have a choice between slipping back to the old status quo of agonizingly slow progress breaking through research roadblocks in three critical areas: finding the causes of lupus, ating symptoms — and boldly seeking paths to end lupus, once and for all.

Your renewed generosity can fund the next great lupus drug, like Lupkynis™, and nsform visions of hope into reality for people living with lupus.

With your continued help, we'll keep accelerating the pace of discovery. With more lupus s and other treatments in the pipeline — and your leadership and support — we can secure senal of safe and effective therapies, and more importantly get them in the hands of people

urge you to renew your support as a Partner in Progress to help us identify the causes of discover new treatments, and advance toward a life free of lupus.

Your wonderful generosity brings hope, and hope inspires the breakthroughs that will lives - and save lives - in the months and years ahead. Thank you.

President & CEO



se renew your gift as a member of Partners in Progress to accelerate the next great ment breakthrough for the estimated 1.5 million Americans with lupus.



### Lead the Fight Against Lupus as a Partner in Progress

**YES!** I accept your invitation to contribute as a member of Partners in Progress, and play a leadership role in the advancement of lupus research and care.

### **Enclosed is my donation of:**

Are you, or is a loved one living with lupus? (Please check all that apply.)

☐ Self ☐ Spouse ☐ Parent ☐ Child

Help Us Solve The Cruel Mystery

2121 K Street, NW, Suite 200 Washington, DC 20037

Signature

Lupus.org

Mr. & Mrs. John Sampleperson DaVinci Direct 36 Cordage Park Plymouth, MA 02360

XXXXXX XXXX

Please make your check payable to Lupus Foundation of America and return it in the enclosed envelope. The Lupus Foundation of America is a not-for-profit charitable organization eligible to receive tax-deductible contributions

# under IRS Code 501(c) (3), Federal ID# 43-1131436.

### Support the world leader in lupus research

With more than 400 funded research studies and fellowships to find treatments, our research delivers the greatest impact in the shortest time possible. And our strategic approach focuses on the areas where research is needed most. For 40 years we have contributed to every major breakthrough in lupus research.

"We owe it to the people of the future to fight for more research funding ... people with lupus deserve better and safer drugs. We all need to do our part. We're close, and we need you. — Dr. Sam Lim, Emory University



## ☐ Please keep me updated on your work. My email address is: ☐ I have or would like to discuss including Lupus Foundation of America in my will or estate plans. Please contact me at: Phone number Management & General 82 Cents of every dollar goes to vital programs!

## Lucile Packard Children's Hospital Stanford Lapsed Donor Recapture

Ms. Jane D. Sampleperson DaVinci Direct 36 Cordage Park Circle Plymouth, MA 02360

I would like to charge my gift to:

2021 SPRING ANNUAL FUND DRIVE

YES, I'll help create bright futures for sick kids like Bucky, and I understand that my gift will fund compassionate care and innovative research.

□\$XX

□ \$XXX

Give online at supportLPCH.org/AnnualFund Please make your check payable to the "Lucile Packard Foundation for

Children's Health" and return with this slip in the envelope provided or enter your credit card information on the reverse side. Thank you!

Ms. Jane D. Sampleperson DaVinci Direct

36 Cordage Park Circle DONOR RE ID Plymouth, MA 02360-7332

Gifts go to the Children's Fund (highest ongoing priorities) unless specified otherwise:

DREN'S PITALS News OR ROLL been named the top 10 's hospitals nation, and children's in Northern fornia.

BEST



Children's Fund

testament support. nk you!





... thanks to friends like you, (Jane)!

Dear (Jane),

Your past gift of \$XX to Packard Children's Hospital provided children like baby Bucky with the world-class medical care they needed to survive — and to look toward the future with hope. However, we haven't heard from you in a while. I hope you are well and will consider renewing your generosity today.

We deeply miss your support, which helps make our life-saving work possible. Now, during our Spring Annual Fund Drive, any gift vou can send will be greatly appreciated and out to use immediately.

We need you to help create healthy, bright tures for seriously ill children who urgently ed us. Thank you.

> Duncan Burgermeister Associate VP, Children's Fund

Duncan Burgermeister Lucile Packard Children's Fund 400 Hamilton Ave Ste 340 Palo Alto CA 94301-1805

21APRLRC

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... thanks to friends like you, (Jane)!

Dear (Jane),

**Bucky Greunke** 

Your past gift of \$XX to Packard Children's Hospital provided children like baby

the world-class medical care they survive — and to look toward the hope. However, we haven't heard a while. I hope you are well and will newing your generosity today.

miss your support, which helps saving work possible. Now, ing Annual Fund Drive, any gift ill be greatly appreciated and diately.

to help create healthy, bright usly ill children who urgently ank you.

Dungan Ruvaovmoist

Duncan Burgermeister Associate VP, Children's Fund

## 2021 SPRING ANNUAL FUND DRIVE

YES, I'll help create bright futures for sick kids like Bucky, and I understand that my gift will fund compassionate care and innovative research.



□\$XX

☐ \$XXX

□\$



Please make your **check** payable to the "Lucile Packard Foundation for Children's Health" and return with this slip in the envelope provided, or enter your **credit card** information on the reverse side. Thank you!

Ms. Jane D. Sampleperson DaVinci Direct 36 Cordage Park Circle Plymouth, MA 02360-7332

DONOR RE ID APPEAL CODE

Gifts go to the *Children's Fund* (highest ongoing priorities) unless specified otherwise:



Children's Fund

my gift to:

☐MC ☐VISA

EXP. DATE

NAME ON CARD

SIGNATURE

E-MAIL (For news and updates; we never share your email.)

☐ To be removed from our mailing list, check here and return this form in the enclosed envelope, or visit supportLPCH.org/Remove

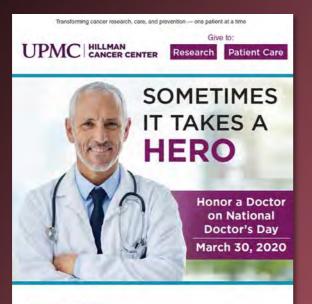
Lucile Packard Foundation for Children's Health 400 Hamilton Avenue, Suite 340, Palo Alto, California 94301-1805 (650) 724-6563 | supportLPCH.org/AnnualFund



We have been named among the top 10 children's hospitals in the nation, and the top children's hospital in Northern California.

This is a testament to your support. Thank you!

## **UPMC** — Doctor's Day & Nurse's Week Emails



Dear <<Mrs. Walsh>>

Doctor's Day is almost here... a day to acknowledge and celebrate the lifechanging work of these special people who have the power to heal - and the compassion to help us through some of the toughest times of our lives.

With their help, we can overcome even the most daunting challenges to live life to the fullest. That's why we call them "heroes."

Today is your chance to be the hero. I invite you to honor a doctor - one of the "everyday heroes" who has made a difference in your life, or in the life of someone you love. Please use the link below to send a note to a doctor - and send a gift in their honor to support medical research or patient care.

> Make a Gift Honor a Hero

We will deliver your personal message on National Doctors Day,

Thank you for supporting Life Changing Medicine at UPMC Hillman!

Sincerely.

Robert L. Ferris, MD, PhD Director, UPMC Hillman Cancer Center

> You can send your note and apply your gift to the life-saving area of your choosing. Simply click below to select your preference. Thank you for your generosity!

Give to

Research

Patient Care



Ranked #7 Nationally by U.S. News and World Report\*







National Nurses Week begins each year on May 6th and ends on May 12th, the birthday of Florence Nightingale, who is considered the founder of modern nursing. Nurses need our support now, more than ever, in this rapidly changing COVID-19 environment.

I hope you'll join me in honoring nurses, and all they do, by making

With new advances in technology and complex treatment regimens, today's nurses need to be smart, dedicated and adaptable - with nerves of steel and hearts of gold. They are key members of our medical teams, because when it comes to delivering compassionate care, they spend more time with the patient than anyone else.

#### **GIVE TO HONOR NURSES!**

Our nurses have the heart to deliver care with compassion, the intelligence to manage state-of-the-art cancer treatment regimens - and the courage to do it all during this unprecedented Coronavirus pandemic

Nurses are the very heart of our team, so please make a gift that shows you appreciate all they do to save lives. Thank you for supporting Life Changing Medicine at UPMC Hillman Cancer Center!

Robert L. Ferris, MD. PhD Director, UPMC Hillman Cancer Center



Ranked #7 Nationally by U.S. News and World Report\*

\*UPMC Presbyterian Shadyside is ranked among the top hospitals in the nation for cancer care by U.S. News & World Report.







Transforming cancer research, care, and prevention UPMC HILLMAN Research Patient Care



### Make a gift to honor our nurses today!

Dear << Mrs. Walsh>>.

I am so proud of our incredible nurses! Nurses Week means more than ever with skill, poise and grace amid the COVID-19 crisis.

I hope you'll join me in honoring nurses, and all they do, by making

UPMC Hillman Cancer Center nurses celebrate victories with patients comfort them after they hear bad news, and advocate for those who need extra help and support. Nurses get to know their patients - and their families - better than anyone else. This makes them powerful advocates for our patients, making sure their needs are met and they are treated with absolute respect and dignity.

#### **GIVE TO HONOR NURSES!**

As we fight to ensure that our patients continue to receive world-class care during this Coronavirus outbreak, these skilled professionals are on the front lines. Our nurses are on the job every day, risking their own lives to save yours, or perhaps to save the life of someone you love.

Nurses are going above and beyond the call of duty right now. Please make a gift that shows how you appreciate all they do to save lives. Thank you for supporting Life Changing Medicine at UPMC Hillman Cancer Center!

Robert L. Ferris, MD. PhD



Ranked #7 Nationally by U.S. News and World Report\*

the too hospitals in the nation for cancer car U.S. News & World Report.







# Digital Cultivation

# Why integrate different types of promotional media?

Because targeting across media will improve results!



Household Display Ads



Email Messages



Social Ads



Mobile Ads



Direct Mail



## Cultivation series creates mutual value over time













Entice new prospects onto the file with value first



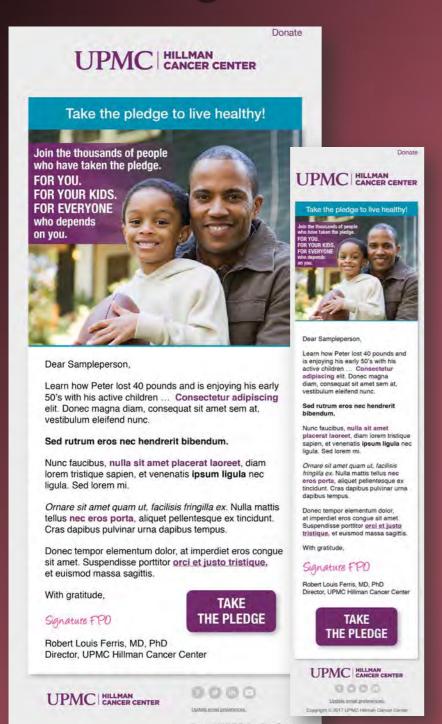
© 2017 UPMC Hillman Cancer Center

UPMC Hillman Cancer Center Home

Solving a real, specific challenge for would-be donors will deliver value from the organization to the prospect.

Leads that receive something valuable are proven to perform better as donors.

Strengthen affinity with non-monetary asks first



Use language that describes the impact the organization has on the lives of others.

Put the email recipient at the center of that value proposition, giving them ownership.

Ask them to perform nonmonetary tasks (like pledging to live healthy), leading to monetary ones.

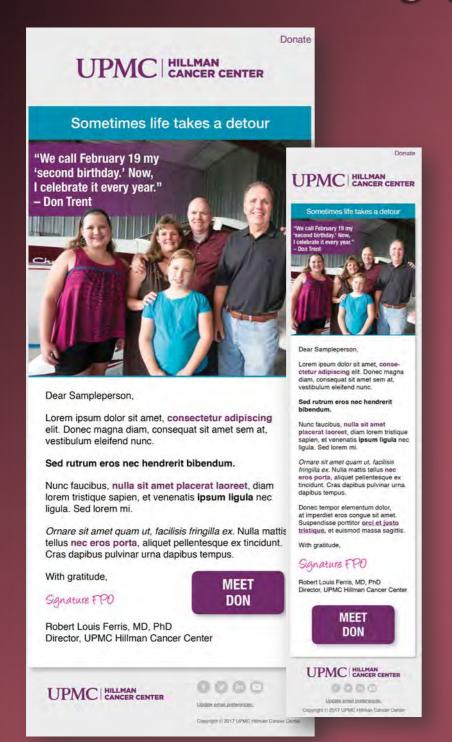
Build understanding of your value



Deliver motivating, inspirational stories of UPMC's impact to show email recipients the value they can receive by investing in the organization's future.

Craft copy that speaks to the real world aspiration or problem you're addressing.

Seek emotional engagement with real, personal stories



Show would-be donors the difference UPMC makes in the lives of people affected by cancer, both those who are sick and their loved ones.

Tell their story and reveal UPMC's unique value proposition for people like Don and his family.

Seek donations with investment messaging



Make the ask when mutual value is understood.

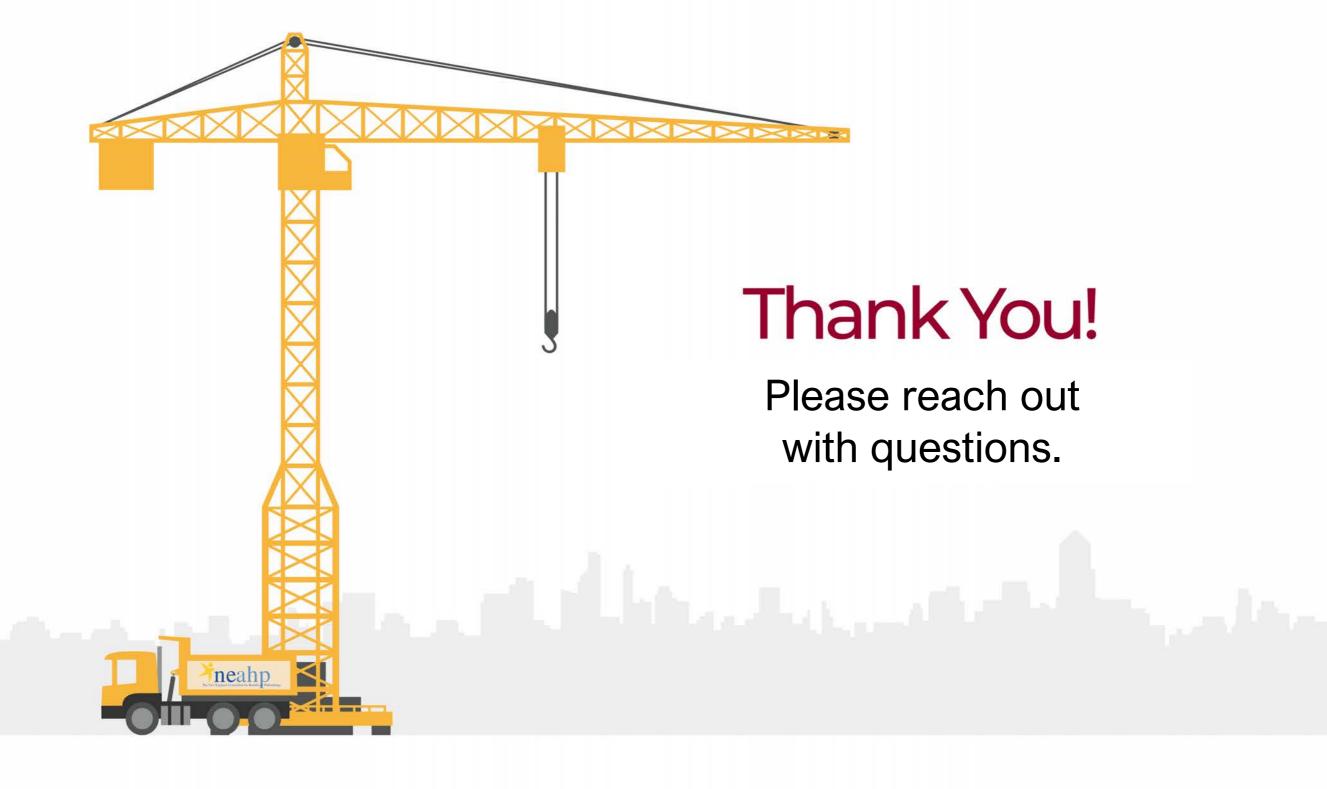
Use strongest direct response offers, such as Challenge Match.

Treat email recipients as if making a donation were the same as making an investment in any other value producing asset.

# Reporting & Analysis

## Surveying and building on knowledge

- Developing a truly data-driven program requires robust results reporting and analysis
- This entails regular reporting throughout the year, as well as a comprehensive annual file audit to evaluate the health of the file and identify trends and areas for improvement
- Regardless of the channel, the impact of every strategic choice should be measurable!
- Over time, the findings will help fine-tune overall program strategy. It's a process of continual improvement.







**Steve Maggio**Co-Founder, President & CEO
DaVinci Direct
steve@davinci-direct.com