

University of Mississippi Medical Center (UMMC)

Request for Capital Campaign Marketing Consultants
(Consulting and Execution)

5by5 Agency Response



A Change Agency

First, we want to thank you for the opportunity

to participate in this process to find the right partner for the University of Mississippi Medical Center (UMMC). As an agency specifically created to serve change makers, we would be honored to come alongside your team for such important work.

You are about to embark on a groundbreaking effort (literally and figuratively) to launch the Cancer Center and Research Institute (CCRI) at the University of Mississippi Medical Center. In doing so, you will serve more Mississippians through:

- World-class cancer patient care, featuring multidisciplinary, physician-led teams
- Expanded research at all phases to better prevent, detect and treat cancer
- Education for Mississippi residents and the medical caregivers who one day will provide their cancer care

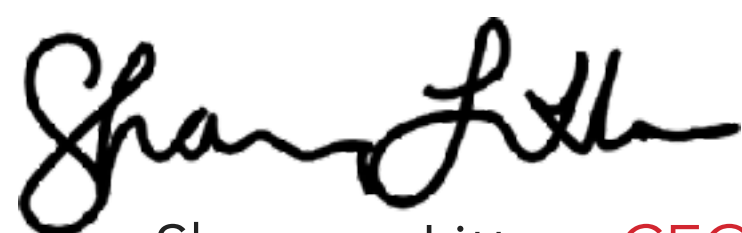
Most importantly, in doing so, you will be living out your mission to improve the lives of Mississippians regardless of race, geography, income, or social status.

That's a big deal and we do not take it lightly. We understand the implications of choosing the right agency partner that gets you. We get you.

We get that telling the right story to mobilize engagement can be extremely complicated, now more than ever before. We get that resources are limited. That technology is constantly shifting and changing. That driving key conversions literally can make or break your opportunity to have impact and break through the clutter. We get the frustrations and opportunities when trying to do something different, something new, something better. We get the challenges you are facing and the hurdles in your way. We get what's at stake.

We believe in hope, beauty, hard work and big ideas. We believe when you're doing work that matters, you have a story that matters, and we take the job of telling that story very seriously. So we lead with strategy first. We immerse ourselves in your organization. We partner as a true extension of your brand and team. We focus on what we should and must do not only to sustain, but also to rise above and break through the clutter.

We would love nothing more than to have the opportunity to come alongside your team and bring the CCRI to life. We are equipped and resourced, but most importantly, we are hungry because who you are is truly why we exist.



Shannon Litton, CEO, 5by5

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4.1 Company Profile

4.1 Company Profile: (5 points) Describe the proposing organization including size, areas of specialization and expertise, client base and any other pertinent information in such a manner that the evaluation committee may reasonably formulate a determination about the stability and strengths of the proposing organization.

We are a privately-owned, LLC and currently have 39 employees.

5by5agency.com

Founded in April 2014

Ownership:

-Shannon Litton, CEO

-Josh Miller, President

-Mike Schatz, Chief Development Officer

5by5 is a full-service marketing agency with a market research division that serves change makers, those who work where life change happens. Over the past decade, our team has worked with change makers across multiple industries, including nonprofit, healthcare and higher education, to clarify, expand and optimize their impact.

5by5 offers a holistic partnership approach to achieving your goals. This includes five service areas: market research, strategy (including organizational, brand and marketing strategy), creative (graphic and digital design, copywriting, photography, videography, UI/UX design), digital and traditional reach (paid and earned marketing strategies and execution to include conversion optimization) and in-house development (a full team of platform-agnostic web developers).

RFP Contact:

Jenny Dwyer, VP of Business Development

5210 Maryland Way, Suite 200

Brentwood, TN 37027

jdwyer@5by5agency.com

(M) 919-623-5193

(O) 615.595.6391 ext. 705

We no longer use fax

4.2 Company Personnel

4.2 Company Personnel: (10 points) State the name, the title or position, and telephone number of the individuals who would have primary responsibility for the scope of work resulting from this RFP. Disclose who within the firm will have prime responsibility and final authority for the work under this contract. Attach a current resume for each individual.

The Approach: Collaboration is everything

When 5by5 is engaged, we become a true partner and extension of your capital campaign team. We not only care about getting you results, but we care about the people on your team, upholding our five core values in everything we do.

We recognize that your team has in-house capabilities and expertise. We will supplement, complement and collaborate with your team and any other outside vendors brought in to strengthen your efforts to become a cohesive engine to achieve your goals. During peak times, we can provide efficiency and support. At all times, we provide an integrated agency perspective, understanding how all spokes in the wheel need to move together to ensure optimal results.

While always respectful, we are not afraid to push back and have challenging conversations anchored in our shared commitment to achieving your goals. We will leverage best practices from other industries to move the needle in a crowded, complicated healthcare marketplace.

Most importantly, we never shy away from celebrating the small and big wins, and we do so often and, when possible, in person with confetti poppers and baked goods!

The Tools: One source of truth

5by5 has created a password-protected dashboard customized to our clients' goals to act as a singular source of truth for our efforts in partnership with your team.

This dashboard is managed by the 5by5 team and includes ongoing status reports for multiple initiatives, provides time and results reports, along with access to download all files provided by our team throughout the partnership.

It can be shared among other partners and stakeholders as an access point to ensure 24/7 transparency and access to the work 5by5 is producing alongside your other efforts.

4.2 Company Personnel

The Team: Your quarterbacks and champions

The UMMC team will work with a specialized 5by5 client team that consists of an account strategist and a project manager who will oversee the partnership, calling on the right subject matter experts every step of the way. They are your 5by5 quarterbacks, providing:

- Proactive account strategy to include researching, identifying and executing new strategic opportunities
- Best-in-class project management to ensure all deadlines and deliverables are met
- Multiple stakeholder alignment through facilitated meetings and transparent access to deliverables, reports, and results
- Open and comprehensive communication, transparency and trust
- Expertise
- Clear and communicated expectations
- Clearly-defined approach and deliverables
- Reporting and results

Individuals who will have primary responsibility for the scope of work:



JORDAN WHITE
Chief Relationship Officer
615.519.0512



EVELYN MCCARTER
Director of
Account Strategy
731.693.6087

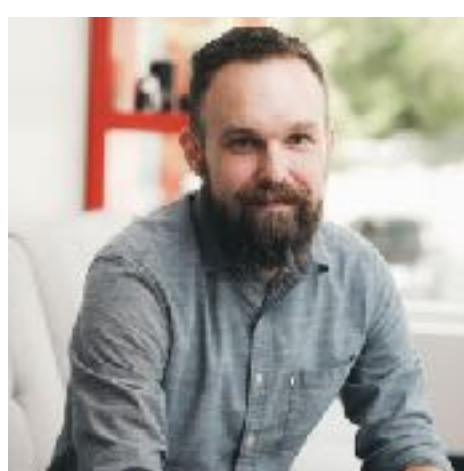


CHLOE COLEY
Director of
Project Management
423.903.5711

Key team members specific to this engagement:



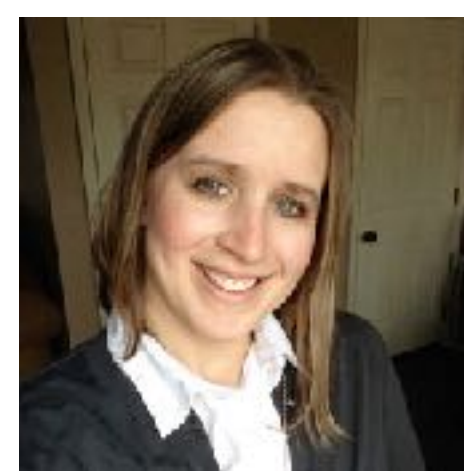
MIKE LENDA
Chief Services Officer



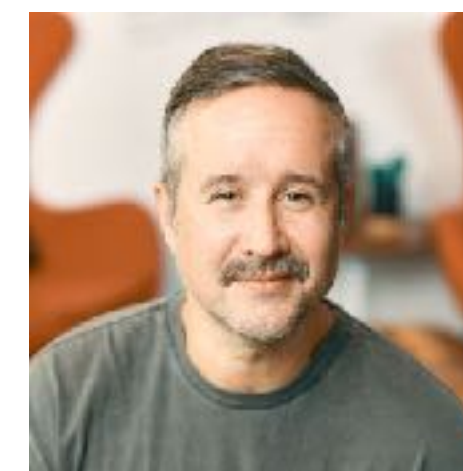
DERRICK HOOG
SVP of Strategy



MARK MCPEAK
SVP of Market Research



CASEY PONTIOUS
Field Work Manager



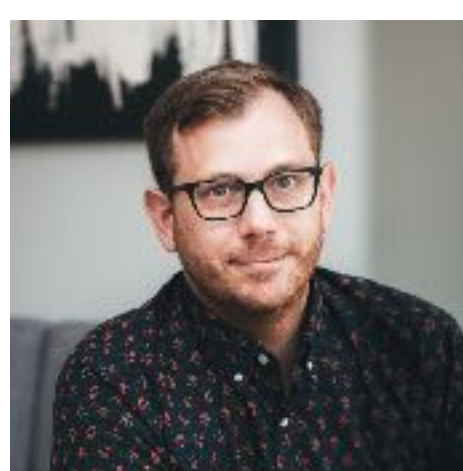
VICTOR HUCKABEE
Creative Director



ASHLEY SPEAR
Associate Creative Director



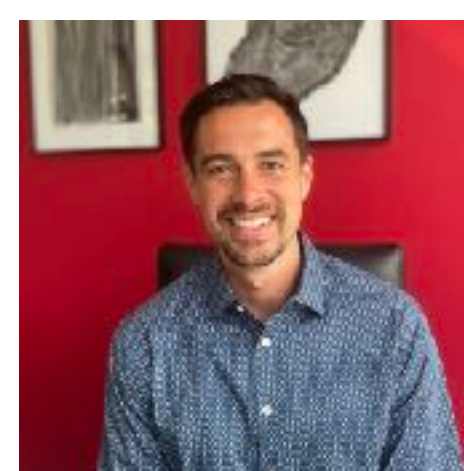
SHANNON LITTON
CEO, Partner



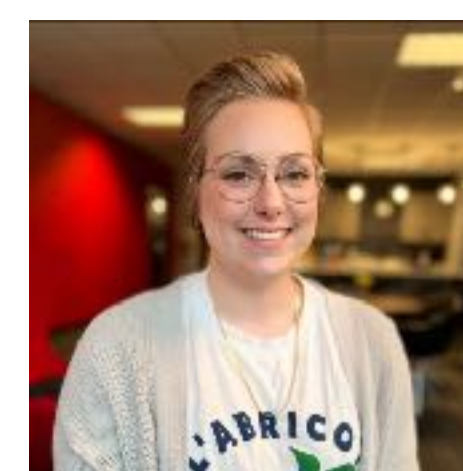
JOSH MILLER
President



JOHNATHAN WOODS
Designer



TRENTON ULVELING
Director of
Web Development



HEATHER GUTHRIE
Traffic Manager

4.2 Company Personnel

KEY TEAM DETAILS - Additional resumes and bios available upon request



JORDAN WHITE
Chief Relationship Officer

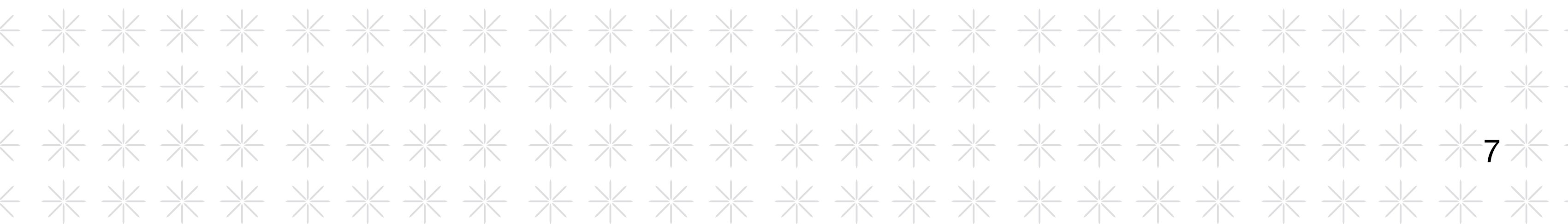
Jordan White, Chief Relationship Officer, Associate Partner, 7+ years

Over the last 7+ years, Jordan has led some of our biggest accounts at 5by5 and held significant leadership roles including VP of Digital. He now serves as our Chief Relationship Officer. He is passionate about helping organizations clarify their message and get the results they desire. He leads the entire account team at 5by5 to focus on best-in-class client experience and results.

Jordan has been instrumental in developing our world-class processes that create great results for our clients by utilizing every service our agency offers. There's not much Jordan hasn't seen or stewarded seamlessly as part of our 5by5 team. He greatly enjoys mentoring other team members and taking on new challenges together.

Jordan's client experience includes Williamson Health, Medi-Share, Nations University, Lipscomb University, Vanderbilt University, National Seating & Mobility, Beltone, The Tennessee Titans, Fellowship of Christian Athletes, among others.

Role in this engagement: The UMMC account team will report up to Jordan who sits on the Executive Leadership Team. Jordan will also have engagement in the onboarding and key milestones throughout the partnership.



Jordan P White / Strategic (mostly digital) marketer and team-first leader

CONTACT

jordanpwhite@gmail.com
Linkedin: jordanpwhite
615.519.0512

INTRO

Hi there, I'm a marketing executive passionate about doing great work, having fun, and taking care of people. I believe great marketing should be simple and great teams drive great results.

WORK

Chief Relationship Officer

5by5 Agency | May 2023 - Present

VP, Digital, Associate Partner

5by5 Agency | Jul 2022 - May 2023

VP, Client Director, Associate Partner

5by5 Agency | Jun 2020 - Jul 2022

Client Director

5by5 Agency | Oct 2016 - Jun 2020

Client Manager

5by5 Agency | Feb 2016 - Oct 2016

EDUCATION

B.A. Creative Writing

University of Tennessee at Chattanooga, 2013

I joined 5by5 as a startup with a big dream and have been one of the key leaders who built it into a 4x Inc 5,000 agency with raving fan clients and incredible results. I started as the first Client Manager and have grown into the CRO position where I lead all of the account team, agency marketing, and sales efforts. In my time at the agency we've grown from a team of 9 to almost 40 and our revenue has increased 6x while also steadily growing profits through amazing client service.

Account Manager

Data Intelligence Group | Sep 2014 - Feb 2016

Marketing Coordinator

Sony Music | Dec 2013 - Aug 2014

Certified Inbound Marketer

Inbound Marketing Agents | Aug 2013 - Dec 2013

4.2 Company Personnel



EVELYN MCCARTER

Director of
Account Strategy

Evelyn McCarter, Director of Account Strategy, less than 1 year

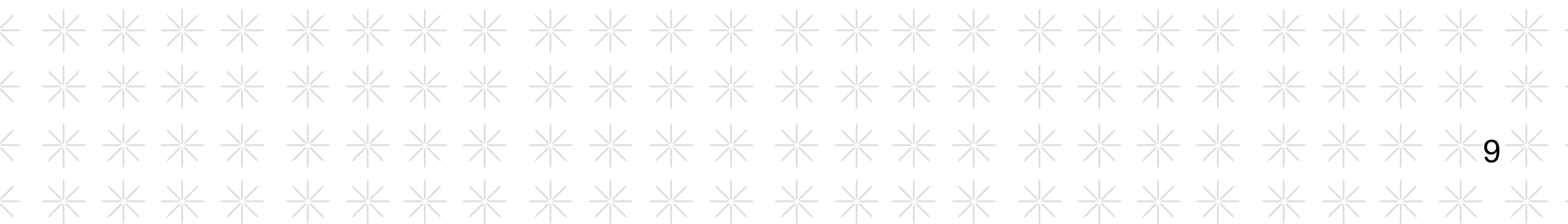
Evelyn McCarter is a strategy first Director of Account Strategy focused on providing the right solutions, to the right people, at the right time. She is passionate about helping others, driving results, and leading with integrity and empathy.

She achieves results by learning about her client's specific audiences, speaking to their pain points, and helping them successfully solve their problems via solution-based marketing.

Her areas of expertise include digital marketing, copywriting, lead generation, and creative problem solving.

Evelyn's client experience includes Williamson Health, Payne Stewart Kids Golf Foundation, World Relief, Oakworth Capital Bank, Habitat for Humanity of Greater Nashville, Farmers Friends, GEODIS Americas, among others.

Role in this engagement: Lead Account Strategist



EVELYN MCCARTER

Spring Hill, TN

731.693.6087

evelyn@evelynmccarter.com

SUMMARY

Quality-focused, collaborative digital marketer experienced in digital marketing, project management, account management, content marketing, sales, and brand awareness. Passionate about solution-based marketing for brands that are making a positive impact on the world.

SKILLS

- Strategic Planning
- Executive Presentation
- Salesforce & Pardot
- Content Creation
- Microsoft Suite
- Inbound Digital Marketing
- B2B Marketing
- Adobe Suite
- Sales & Customer Relations

EXPERIENCE

5by5

Director of Account Strategy

June 2023 – Present

- Researches, develops, and communicates strategic marketing plans to meet clients' marketing goals.
- Analyses data and makes optimization recommendations to increase marketing campaign performance.
- Measures and reports on campaign performance metrics to clients.
- Keeps up with current trends to provide timely insight into marketing initiatives.
- Works alongside Project Management team to ensure work is complete to client's standards

GEODIS Logistics

Marketing Manager, Warehousing & Related Products

December 2021 – Present

- Developed and implemented campaign strategy for growth parcel product with marketing influenced pipeline reaching \$3M+.
- Developed and implemented sales enablement strategy and executed enablement tactics while working together with sales team to improve sales efficiency.
- Developed and implemented content marketing strategy.
- Managed end-to-end lead qualification process for number one revenue-generating business line, including Salesforce reporting and executive dashboards.
- Managed weekly reporting and presenting to executive team.
- Managed Demand Generation Analyst onboarding and backfill training.

GEODIS Logistics

Marketing Analyst, Warehousing & Related Products

January 2021 – December 2021

- Supported the first-ever brand awareness campaign for GEODIS, with lifetime, qualified revenue equaling \$500M+.
- Managed end-to-end lead qualification process, with lead generation at 900% year-over-year.
- Supported content marketing, writing and editing articles across multiple products and campaigns. Managed content writing via a rolling content calendar in Monday.com.
- Researched key account lists for RollWorks platform.
- Supported the launch of the new eLogistics product, including SEM and programmatic tactics.

EVELYN MCCARTER

Spring Hill, TN

731.693.6087

evelyn@evelynmccarter.com

- Created Pardot email copy and creative for email nurture campaigns.

Awaken Films

Project Manager

2012 – 2021

- Managed hundreds of clients from project kick-off to final delivery.
- Project Video editor, website manager, copywriter, social media manager, and producer across clients.
- Created brand-compliant content leveraged to sell services to prospects.
- Acted as a brand consultant, created and executed digital marketing plans for multiple brands seeking digital marketing advice.

CanSource

Southeastern Brewery Sales Representative

2016 – 2017

- Managed sales and client relationships for the Southeastern region.
- Increased customers by 400% in the region.
- Created and managed content leveraged to build prospective client relationships.
- Coordinated shipping logistics between warehouses, shippers, and clients.
- Managed industry tradeshow and events.

Andrew Jackson's Hermitage

Digital Information Specialist

2015 – 2016

- Created and managed digital content, videos, Google AdWords campaigns, email marketing, and special event videography and photography.
- Developed and managed special events and post-event marketing.

Seek First Productions

Producer

2013 – 2014

- Created shot lists, schedules, and budgets.
- Analyzed scripts, booked locations, vendors, talent, and crew.
- Managed multiple websites, social media accounts, and blog content.

EDUCATION

Middle Tennessee State University – 2013

Bachelor of Science, Mass Communications | Secretary (2011 – 2012), Vice President (2012 – 2013): MTSU Film Guild

4.2 Company Personnel



CHLOE COLEY
Director of
Project Management

Chloe Coley, Director of Project Management, 5 years

As Director of Project Management at 5by5, Chloe enjoys partnering with organizations to hone their marketing processes and grow their relationships with new and existing audiences.

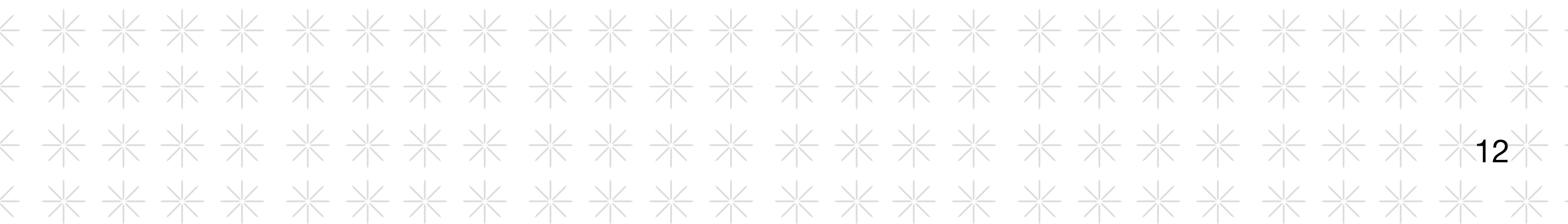
Chloe was the lead project manager for the \$200 million Williamson Health capital campaign efforts and in turn, we are very confident with her leadership on your account which has similar needs.

She draws from her integrated marketing and public relations experience in various industries – including healthcare, higher education, business services and more – to help companies refine their messaging and achieve measurable results. Her eye for detail and thorough communication ensures her clients' needs are met and no step goes unnoticed.

Chloe understands the importance of companies being seen as thought leaders and finds value in securing earned media opportunities. She has worked closely with several media outlets, including Business Insider, Entrepreneur, and the Rachael Ray Show. She has secured publicity for her clients in USA Today, US News & World Report, trade media, local news outlets, and more.

Client experience includes: Williamson Health, Habitat for Humanity of Greater Nashville, Show Hope, Awana, Food for the Hungry, Ascend Federal Credit Union, Business Intelligence Associates, Bernard Health, Legal Aid Society, and Harper Horizon, an imprint of Harper Collins, among others.

Role in this engagement: Lead Project Manager





CHLOE COLEY



Nashville, Tennessee
chloe.coley3@gmail.com
423.903.5711

PROFILE

With 10 years of marketing and project management experience both in-house and at an agency, my greatest strengths are relationship development, creative problem solving, managing budgets and timelines, leading teams, and keeping teams organized and on track to meet established goals.

RELEVANT EXPERIENCE

5by5 AGENCY

Director of Project Management

February 2021 – Present

August 2023 – Present

- All senior client manager responsibilities, plus:
- Serving as the primary liaison between account and services teams when discussing process adjustments
- Owning the ongoing improvement of account service processes
- Owning and improving project management templates
- Training project management team on new systems and processes

Senior Client Manager

July 2022 – August 2023

- All client manager responsibilities, plus:
- Speaking into marketing tactics and strategies
- Independently building strong relationships with accounts and creatively solving problems

Client Manager

February 2021– August 2022

- Proactive management of accounts
- Building strong, personal relationships with clients
- Creating project plans to accomplish client goals
- Prompt, effective communication with clients
- Leading meetings with clients and internal teams

THE BRADFORD GROUP

September 2018 – February 2021

Account Executive/Associate

- Worked on account teams for B2B clients in the healthcare, finance, tech and business services industries
- Created and nurtured local and national media relationships
- Brainstormed pitch topics, crafted pitches and secured national, trade and local coverage
- Wrote, pitched and secured placement of press releases as well as distributed releases on the wire
- Ghostwrote bylined articles, case studies, blogs and website content
- Drafted award nominations on behalf of clients resulting in a 73% success rate (i.e. client being recognized as winner or finalist)

COLEY & COLEY FAMILY EYECARE – Marketing Coordinator

April 2017 – August 2018

- Responsible for all social media platforms, blog and website content
- Sent regular newsletters to patients and responded to messages

FRANKLIN ROAD ACADEMY – Communications Coordinator

July 2015 – June 2017

- Assisted in creating and editing all school marketing materials and website content
- Created and edited weekly newsletter sent to several thousand people
- Wrote fundraising letters which contributed in raising more than one million dollars toward the annual fund

EDUCATION

Belmont University

Bachelor of Arts, Public Relations; Spanish Minor
GPA: 3.95; The highest GPA of any 2015-2016 public relations graduate
Alpha Chi member (Belmont's highest honor society); Dean's List every semester

August 2012 – December 2015

4.2 Company Personnel



SHANNON LITTON
CEO, Partner

Shannon Litton, CEO

With 20+ years in agency leadership, Shannon has worked with over 500 organizations on everything from rebranding to multicultural marketing. She has also worked in a variety of fundraising capacities both professionally and volunteer (board member, consultant, campaign chair) focusing on campaign creative, storytelling and community engagement.

She has also held roles as executive marketing consultant for capital campaigns (churches and schools) leading creative and storytelling aspects for multi-million dollar campaigns.

She's an expert in developing strategies that propel change down the street or around the world... and she makes it fun for everyone involved.

Prior to establishing 5by5, Shannon co-founded a successful marketing and technology agency, concepted and launched a SaaS product, worked in marketing for a technology leader in the education industry, provided marketing consulting to nonprofits engaged in multi-million dollar fundraising campaigns, plus lived and worked in the Dominican Republic with an international organization. She understands the unique challenges facing today's business leaders and how to help them break through the clutter in an overcrowded marketplace.

Shannon regularly speaks on leadership, marketing, branding and business strategy. She has addressed a variety of audiences from NFL athletes to healthcare innovation leaders and she is an Entrepreneur magazine contributor. Ask her about her favorite accomplishment, though, and she'll proudly tell you that 5by5 has been named one of INC's "Fastest Growing Companies" for four years and counting.

4.2 Company Personnel



MARK MCPEAK
SVP of Market Research

Mark McPeak, SVP of Market Research

Mark has over 30 years of experience leading market research projects with organizations across a wide array of industries. He began his market research career working with world's largest automotive corporations in the Detroit area. He went on to open and operate a regional office for one of the nation's largest research companies. Mark also has executive experience leading an international organization operating in over 30 countries, bringing a unique global perspective to the work he now does for our change maker clients.

In addition to his Masters in management, Mark has developed hands-on expertise in business and organizational strategy contributing invaluable insights to our strategic process. At 5by5, we often say excellent marketing is the intersection of art and science. Mark and his team bring the science, with a deep understanding of how research findings can clarify the strategic trajectory for an organization eager to foster a loyal audience base and break through the clutter of competition.

Mark spent a portion of his career in a consulting firm helping churches and nonprofits raise funds – primarily for large capital projects (new buildings, etc.). In this role he became a student of fundraising and developed a capital campaign model using communication and change theories.

Later Mark oversaw the stateside operations of an international ministry which included overseas missionaries and NGO workers. He oversaw a full development team which was responsible for donor management strategy and execution. For a time, Mark served as a consultant to a large international ministry helping them build the team and systems to transition from a sales to donation model of support.

Mark's client experience includes Williamson Health, Lincoln Health System, Awana, The Gideons International, Duracell, The Tennessee Titans, Amazon, Zillow, Connected Caregiver, and more.

4.2 Company Personnel



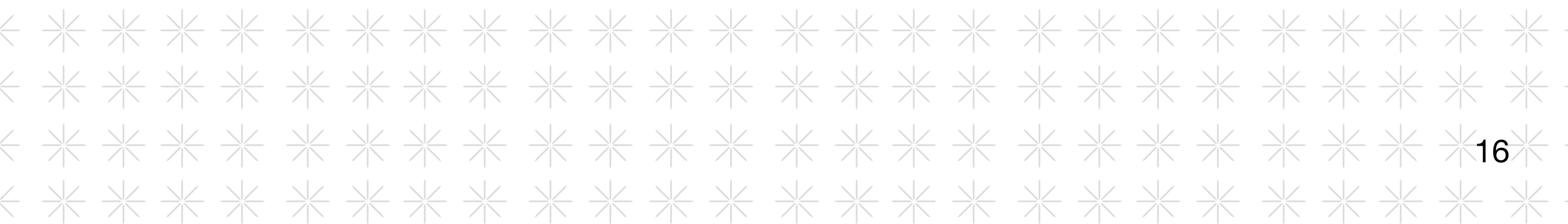
DERRICK HOOG
SVP of Strategy

Derrick Hoog, SVP of Strategy

As a founding member of 5by5, Derrick has played an integral role in architecting our strategic approach, process and team since the very beginning. He has a varied background including managing a team for a national financial brand and business development at another global marketing agency. Derrick leads with curiosity as he intently listens to the business challenges and marketing goals. This serves him well in a role where he is constantly learning new industries and business models.

He's a man of many talents and has even earned an Innovation certification from MIT. He's known for breaking down existing strategies into their simplest form, then reengineering them to work smarter and deliver better results. He does this by identifying all of the potential pathways that could lead toward our client's goals and then creating strategic recommendations on which ones to pursue. Derrick is equal parts cartographer and guide - laying out the best possible route to your destination and then taking you there.

Derrick's client experience includes Williamson Health, International Rett Syndrome Foundation, Compassion International, Lipscomb University, Vanderbilt University, National Seating & Mobility, Medi-Share, Fellowship of Christian Athletes, among others.



4.2 Company Personnel



VICTOR HUCKABEE
Creative Director

Victor Huckabee, Creative Director

Victor Samuel Huckabee is a multi-disciplined Creative Director with deep experience in graphic design and a unique style of illustration. Currently residing in Nashville, Tennessee, Victor spent his formative years studying digital communications in Switzerland. Since kickstarting his professional career in Nashville, he has worked with a wide variety of artists & organizations and has become a respected leader in the field of graphic design.

From creatively raising funds for access to HIV/AIDS treatments and clean water wells in Africa to working with an international travel guide brand, to inspiring a world of characters for Dreamworks Animation, Victor has devoted his life to creativity and doing good in the world.

Victor's client experience includes Williamson Health, Habitat for Humanity of Greater Nashville, National Seating & Mobility, Medi-Share, Blood:Water, Mount Vernon Nazarene University, Connected Caregiver, Nashville Rescue Mission, Oakworth Capital Bank, Creative Director at Lonely Planet for 5 years, art direction for GoNoodle and Archibald creator, an Emmy-nominated animated series on Netflix.



4.2 Company Personnel

While the key team members introduced will be at the front-lines of our efforts, representatives of key leadership for 5by5 are outlined below to provide a bigger picture of our in-house expertise:

[Executive Team]

- **Shannon Litton, CEO / Partner / Founder, 9+ years**
- **Mike Schatz, Chief Development Officer / Partner / Founder, 9+ years**
- **Josh Miller, President / Partner / Founder, 9+ years**

- **Aaron Crum, Chief Operating Officer / Associate Partner, 5+ years**

[Operations Team]

- Ginny Burton, VP of Operations / Founder / Associate Partner, 9+ years

- **Mike Lenda, Chief Services Officer, less than 1 year**

[Services Team]

- Derrick Hoog, SVP of Strategy / Associate Partner / Founder, 9+ years
 - Mark McPeak, SVP of Market Research / Associate Partner, 6 years
 - Victor Huckabee, Creative Director, 1+ year
 - Ashley Spear, Associate Creative Director, 8+ years
 - Alex Kittavong, UI/UX Design, 3+ years
 - Josh Kelley, Videographer / Production Lead, 2+ years
 - Laura McClellan, Senior Copywriter, 9+ years
 - Abby Weeks, Designer, 2+ years
 - Johnathan Woods, Designer, 2+ years
 - Trenton Ulveling, Director of Development, 2+ years - oversees web development team which includes 3 additional team members.
 - Patrick McLendon, Director of Optimization, 2+ years
 - Krissy Pleiman, Director of Digital, 3+ years
 - Austin Evans, SEO / Content Strategist, 5+ years
 - Jonah Turner, Manager of Email & CRM, 2+ years
 - Heather Guthrie, Traffic Manager, 5+ years

 - **Jordan White, Chief Relationship Officer, 7+ years**
- [Account Team - includes 10 additional team members]**
- Evelyn McCarter, Director of Account Strategy, less than 1 year
 - Chloe Coley, Director of Project Management, 2+ years

(The full team is 39 employees)

4.3 Experience

4.3 Experience: (20 points)

Indicate the experience the respondent has in the requested services as outlined in Section 4, Scope of Work. Describe any additional experience that would substantiate and enhance the qualifications of the respondent in regard to the performance of a contract resulting from this solicitation.

If we were in your shoes, we would want our agency team to be an expert in the healthcare industry, to be collaborative in nature and to have a proven process for how to become a true extension of the UMMC team. In a word, us.

Expertise: Our team has substantial collective experience in the healthcare space, from healthcare systems to foundations to universities and other for-profit organizations across the country. We understand the right questions to ask to get to the insights that will equip your team and ours to make key strategic decisions that lead to actionable strategies and measurable results.

We have worked with regional hospital systems (Williamson Health and Lincoln Health System) that came to us looking to elevate their reputation and reach to better serve their community and keep patients in town for care (rather than traveling to other competing health systems in larger counties). And in the case of Williamson Health, they came to us on the brink of a \$200 million capital campaign.

Mark McPeak our SVP of Market Research spent a portion of his career in a consulting firm helping churches and nonprofits raise funds – primarily for large capital projects (new buildings, etc.). In this role he became a student of fundraising and developed a capital campaign model using communication and change theories.

Later Mark oversaw the stateside operations of an international ministry which included overseas missionaries and NGO workers. He oversaw a full development team which was responsible for donor management strategy and execution. For a time, Mark served as a consultant to a large international ministry helping them build the team and systems to transition from a sales to donation model of support.

We have been in contact with the National Cancer Institute (NCI) to do deeper research into the application process for UMMC to be considered as an NCI-Designated Cancer Center. We are confident we have the right expertise to be a strategic partner to your team as you prepare for that rigorous process.

4.3 Experience

Collaborative Culture: Come the end of the day, we are all people working alongside other people. Our team's culture both internally and externally is firmly rooted in core tenants of courageous leadership, including but not limited to: curiosity, integrity, accessibility, diversity, leveraging strengths and expertise, challenging one another respectfully, and aligning on a path forward to charge it with strategic strength.

Proven Process: This isn't our first rodeo as you will see in the case studies to follow. Whether we are working directly with your team, other vendors you've brought in to strengthen your position, or other parts of the organization, your lead 5by5 Account Team will:

- Intake communication via strategic planning meetings / email / phone call from the client and other partners
- Facilitate collaborative discussions to:
 - Assess the opportunity and the collective strengths of those involved
 - Clearly define the roles and responsibilities of those involved
 - Clearly define the goals and metrics for success
 - Provide detailed follow up communications with actionable next steps and timelines accordingly
- Manage the project, acting as a quarterback between all key stakeholders and executing as an extension of your team

The case studies to follow will bring to life how our experience has impacted change makers like you over the years:

Williamson Health and the Williamson Health Foundation - pg. 21 - 39

Habitat for Humanity of Greater Nashville - pg. 40 - 44

National Seating & Mobility - pg. 45 - 51

More Campaign Experience

Lincoln Health System - pg. 53 - 54

International Rett Syndrome Foundation - pg. 55 - 56

Foursquare Disaster Relief - pg. 57 - 58

Tennessee Department of Health - pg. 59

More Research Experience

Overview - pg. 61

Connected Caregiver - pg. 62 - 64

Additional Experience - pg. 65 - 66

— WILLIAMSON HEALTH

5BY5 REBRANDS & ROLLS OUT

regional health system



BACKGROUND

Williamson Health (WH), formerly Williamson Medical Center, is a nationally awarded hospital system that has served the Williamson County community for over 60 years. **5by5 came alongside WH at a critical inflection point in its history and growth.**



A snapshot of the brand architecture before the partnership with 5by5

RESULTS

Rebrand and Omni-channel Roll-out

WH's primary need was a much larger ask with huge implications.

From its inception, the health system had expanded from a small, 50-bed hospital to a regional, full-service healthcare system offering exceptional care and a wide variety of high-quality specialists, primary care physicians and services. The brand, however, had not evolved with the capabilities and reputation of the system. **This was causing market confusion and missed revenue potential.**

Our team of market researchers and brand strategists went to work redefining the brand architecture of the entire health system, the WH Foundation, and over 30 affiliated entities spread throughout the county.

Once the market research was analyzed, and the architecture and naming convention was clear, the renaming and rebranding process was underway. This included the following:

- Primary brand perception market research to include brand testing before and during the rebrand process
- Brand Identity - internal framework for establishing a brand perspective, strengths, and personality
- Brand Messaging - external framework for accurately and consistently communicating the Brand Identity
- Visual Brand Strategy - a brand kit with multiple logo variations, new color scheme, typography, and best practices.

RESULTS

- Comprehensive brand roll-out that included an advertising plan and media placement strategy covering out-of-home, broadcast, print, and digital/web/internet/mobile media platforms, as well as over-the-top streaming placements on platforms like Tubi, HGTV, Food Network, Channel, Netflix, Hulu, YouTube, Spotify, etc.
 - Display and retargeting ads
 - Out-of-home advertising
 - Strategic billboard placement
 - Media partner advertisements
 - Event strategy
 - Traditional TV advertising
 - Website assets
 - Social media assets
 - Program brochure templates
 - Various other marketing deliverables as-needed, such as event giveaway merchandise and banners

As a result, Williamson Medical Center transformed into Williamson Health, an entirely new brand identity for the health system that honored the history of the organization and cast an exciting new vision for the future.

Excerpt of brand roll out calendar

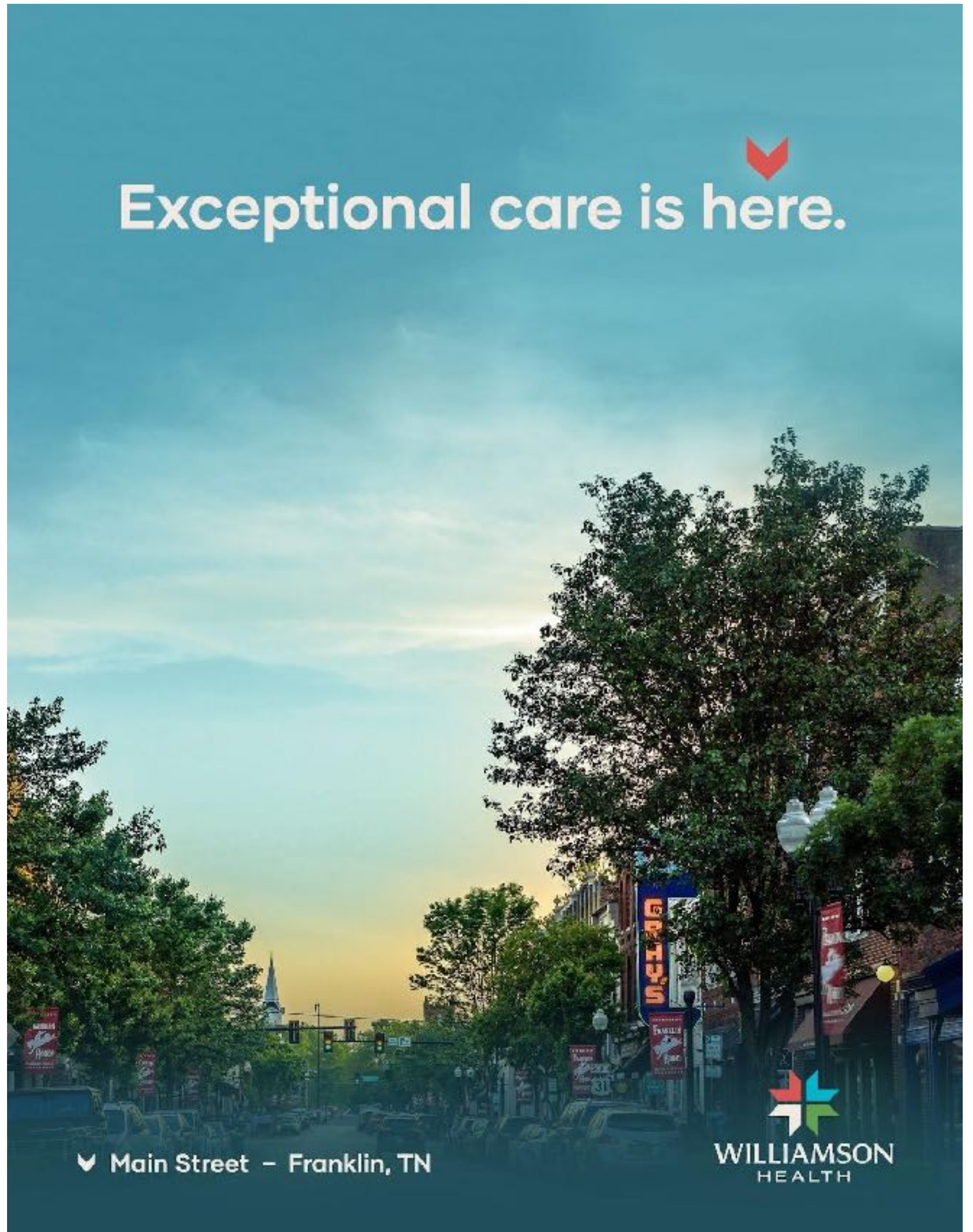
WILLIAMSON HEALTH BRAND ROLLOUT	PHASE 1: PLANNING & ASSET DEVELOPMENT										BRAND ROLLOUT CAMPAIGN								
	OCTOBER		NOVEMBER				DECEMBER				JANUARY				FEBRUARY		MARCH		
Start	2-7	10-14	17-21	24-28	31-4	7-11	14-18	21-25	28-31	3-7	10-14	17-21	24-28	31-3	6-10	13-17	20-24	27-31	
WEBSITE																			
New Designs / Wireframes / Site Structure																			
Website Development & Content Entry																			
Data Period																			
Website Launch																			
BRAND FILES & DOCUMENTATION (days)																			
X Logo Files + Brand Architecture																			
X Brand Style Sheet																			
X Brand Guidelines																			
X Social Media Profile Pictures/Covers																			
X Lower Thirds (animated) - bbyc to discuss with Nick																			
CREATIVE ASSETS																			
X Landing Page (Copy + Design + Dev)																			
X Logo Reveal Video																			
X Brand Story Video																			
INTERNAL ROLLOUT																			
X Investigate pricing / plan for branded outdoor setup																			
X Investigate pricing for outdoor projection on the side of building																			
X Logo Callouts (B-roll)																			
X New Merch with Foundation Logo																			
X Redesign Case for Support (Foundation)																			
X Communication Plan & Internal Strategy																			
X Key Stakeholder Announcement																			
X Employee Email (1/7)																			
X Email Newsletter Announcement to Full Staff																			
X Rebrand Announcement Deck (Internal)																			
X Quarterly Employee Forum																			
X Gift Box for Doctors/Patients																			

RESULTS



Paying homage to where we have been, the arrows in this mark are pulled directly from the previous Williamson Medical Center logo, but they now communicate more about where we're going. The arrows point inward to create a new take on the cross — an intersection. The shape and differing colors imply a bringing together of community. A place where people from Brentwood, Nolensville, Spring Hill, Leiper's Fork and Franklin (along with every other community spread across Williamson County) can come together confidently for the sake of health.

This is a declaration, a promise and an announcement. In the same way this mark brings us together, it also represents a beacon proclaiming exceptional care is within reach at Williamson Health. So whether you're fishing, hiking, riding, driving or just being you, Williamson Health is close by, right where you need us.



RESULTS



A white rectangular graphic containing the Williamson Health logo at the top, which is the colorful four-pointed star. Below the logo, the text "WILLIAMSON HEALTH" is written in a bold, sans-serif font. Underneath, there is a horizontal line. Below the line, there are three logos: the Williamson Medical Center logo, the BJI Bone and Joint Institute logo, and the Vanderbilt Health and Williamson Medical Center Walk-In Clinic logo.

An advertisement featuring a photograph of a street scene at sunset or sunrise. The street is lined with trees and buildings. The sky is a mix of orange, yellow, and blue. The text "Exceptional Care is Here." is overlaid at the bottom in a white, sans-serif font. A small blue arrow points to the right.

An advertisement featuring a photograph of a building, likely the Williamson Medical Center, with a red arrow pointing down. The text "Exceptional Care is Here." is overlaid in a white, sans-serif font. Below this, the Williamson Health logo is shown, followed by the text "Williamson Medical Center is now part of Williamson Health!". At the bottom right, there is a white button with the text "LEARN MORE".

A white rectangular graphic containing the Williamson Health logo at the top, which is the colorful four-pointed star. Below the logo, the text "WILLIAMSON HEALTH" is written in a bold, sans-serif font. Underneath, there is a horizontal line. Below the line, there are three logos: the BJI Bone and Joint Institute logo, the Williamson Medical Center logo, and the Vanderbilt Health and Williamson Medical Center Walk-In Clinic logo.

An advertisement featuring a photograph of a farm scene with a large red barn and people sitting on a grassy field. The sky is blue with some clouds. The text "Exceptional Care is Here." is overlaid at the bottom in a white, sans-serif font. A small blue arrow points to the right.

RESULTS

Visit <https://williamsonhealth.org/>

The screenshot shows the top navigation bar with links for 'Join our team', 'Support Williamson Health', and 'Partner Portal'. Below the navigation is a main header with the Williamson Health logo and a navigation menu including 'About', 'Medical Services', 'Find a Doctor', 'Patients & Visitors', and 'Patient Portal'. The main content area features a large image of a family walking in a hospital hallway, with the headline 'Here to provide you with world-class care.' and a sub-headline 'Whether you're looking for a world-class hospital, convenient walk-in clinics or bone and joint specialists, Williamson Health provides the top-tier care you need, right around the corner.' Below this is a testimonial section titled 'We know Wilco.' with a quote from Kristee Dailey, a Williamson County parent, and a list of awards including 'BEST HOSPITALS' for Cancer Care, Heart Care, and Primary Care. The bottom section is titled 'World-class hospital services for every need' and lists services like Breast Health Center, Surgery, OB & NICU, and Cardiology.

This advertisement features a large image of a man carrying a child on his shoulders. The headline reads 'Trusted partners expanding care'. Below the headline is a testimonial from Kristee Dailey, a Williamson County parent, who says: 'I don't think I've ever had a better hospital experience. An experience when "Rocky" (my staff person) was kind to us and genuinely wanted to support the recently moved, worried mom, who showed up in the middle of the night, with a very sick baby, and no family or friends to call.' The advertisement also includes logos for 'Children's Hospital at Williamson Medical Center', 'BONE AND JOINT INSTITUTE', and 'Vanderbilt Health and Williamson Medical Center Walk-In Clinic'.

This advertisement features a map of Williamson County with various service locations marked. The headline reads 'Wherever you are, so are we.' Below the headline is a list of services: Williamson Medical Center, Rose and John Insull of Tennessee Main Campus, Monroe Carol Dr. Children's Hospital Vanderbilt at Williamson Medical Center, Williamson Health Turner-Dugas Breast Health Center, 3 Outpatient Imaging Clinics, 3 Easily Accessible Laboratory Clinics, 4 Bone and Joint Int. Int. Urgent Care Clinics and Rehabilitation Services, 5 Vanderbilt Health and Williamson Medical Center Walk-In Clinics, 14 Primary and Specialty Care Physician Practices, and 18 Rapid Response EMS Units. A 'Use The Map' button is also present.

This advertisement features a dark background with white text. The headline reads 'ANNOUNCEMENT: Williamson Health announces historic expansion to facilities and services.' Below the headline is a quote from a representative: 'Williamson Health is already a premier healthcare system providing high-quality care. As Williamson County and the surrounding region continue to grow, it's imperative that Williamson Health do the same. We are committed to providing the highest quality healthcare to the communities we serve, and these world-class additions and renovations will allow us to continue going so far years to come.' The advertisement also includes a 'See What's Coming' button.

This advertisement features a grid of service categories under the headline 'What can we help you find?'. The categories include: Emergency Care Info (4321 Carothers Park, Franklin, TN 37067, 615-432-9200, Fax: 615-432-1411), Patients & Visitors (Find a Doctor, Medical Services, Patient Portal), and Quick Links (Site to WHC, Donorship Resources, WH Foundation, Quality & Safety Awards, No Surprises Act). The advertisement also includes the Williamson Health logo and social media icons.

RESULTS



Same excellent care, new unified brand.

You already know the care we provide as an organization goes above and beyond our award-winning hospital. We're a robust health system serving Williamson County and the surrounding area. Now, our name reflects it.

To better represent the many ways we care for our community, we are excited to announce the launch of our new brand, Williamson Health.

We will continue to provide world-class care by way of Williamson Medical Center, The Turner-Dugas Breast Health Center, Bone and Joint Institute of Tennessee, The Monroe Carell Jr. Children's Hospital Vanderbilt at Williamson Medical Center, a countywide EMS organization, a joint venture with Vanderbilt Health for several walk-in clinics, multiple physician-led clinics strategically located across the county and more – but now, all our facilities and providers are united under one cohesive brand.



LEARN MORE at williamsonhealth.org or scan the QR code!

Williamson Health Logo Reveal -

<https://vimeo.com/819880994/88d64c9b02?share=copy>

Williamson Health Brand Film -

<https://vimeo.com/819880760/56480b920d?share=copy>

Williamson Health Brand Film 30s -

<https://vimeo.com/819880738/4acad1d5aa?share=copy>

Williamson Health Brand Film 15s -

<https://vimeo.com/819880711/a1afb49849?share=copy>



RESULTS

Capital Campaign for the Foundation

The associated Williamson Medical Center Foundation had a specific goal to raise \$30 million of the total \$200 million to meet a wide range of needs, from Operation Pink Chairs, which provides comfort to women recovering from breast cancer surgery, to various facility- and technology-related improvements to expand the health system's capacity to serve its neighbors.

5by5 partnered with Williamson Health's PR team, Alday PR, to quarterback a comprehensive strategic approach to roll out the rebrand to the Foundation's highly invested donors and stakeholders. This included the following:

- Campaign Creative Concepts: utilizing the Foundation brand elements and the newly-developed case for support, 5by5 provided campaign creative concepts to include recommended copy headlines to establish the tagline and art direction of campaign elements
- Campaign Pitch Deck & One-Pager: we created an animated presentation / pitch template and one-pager to include suggested content which included media to educate and entertain while having one-to-one fundraising conversations
- Campaign Advocate Toolkit: we built infographics, one-pager, resources, etc. to equip the influencers and advocates to leverage their own story and participate in the fundraising component of the campaign
- Campaign Microsite: we designed and built a campaign microsite to include case for support content, video, renderings and other

collateral content

RESULTS

- Strategic Recommendations Involving Campaign Spokespeople: we worked with the Foundation and campaign spokespeople Luke and Caroline Bryan, including developing the memorandum of understanding (MOU) signed by both parties, designing co-branded merchandise sold at the hospital gift shop and overseeing events including the Bryans and other key spokespeople.
- Event Project Management and Asset Development - As key portions of the expansion and renovation project were completed, 5by5 designed and developed assets for events such as the groundbreaking celebration and ER ribbon cutting. We also managed weekly planning meetings involving the Foundation team and their various contractors.



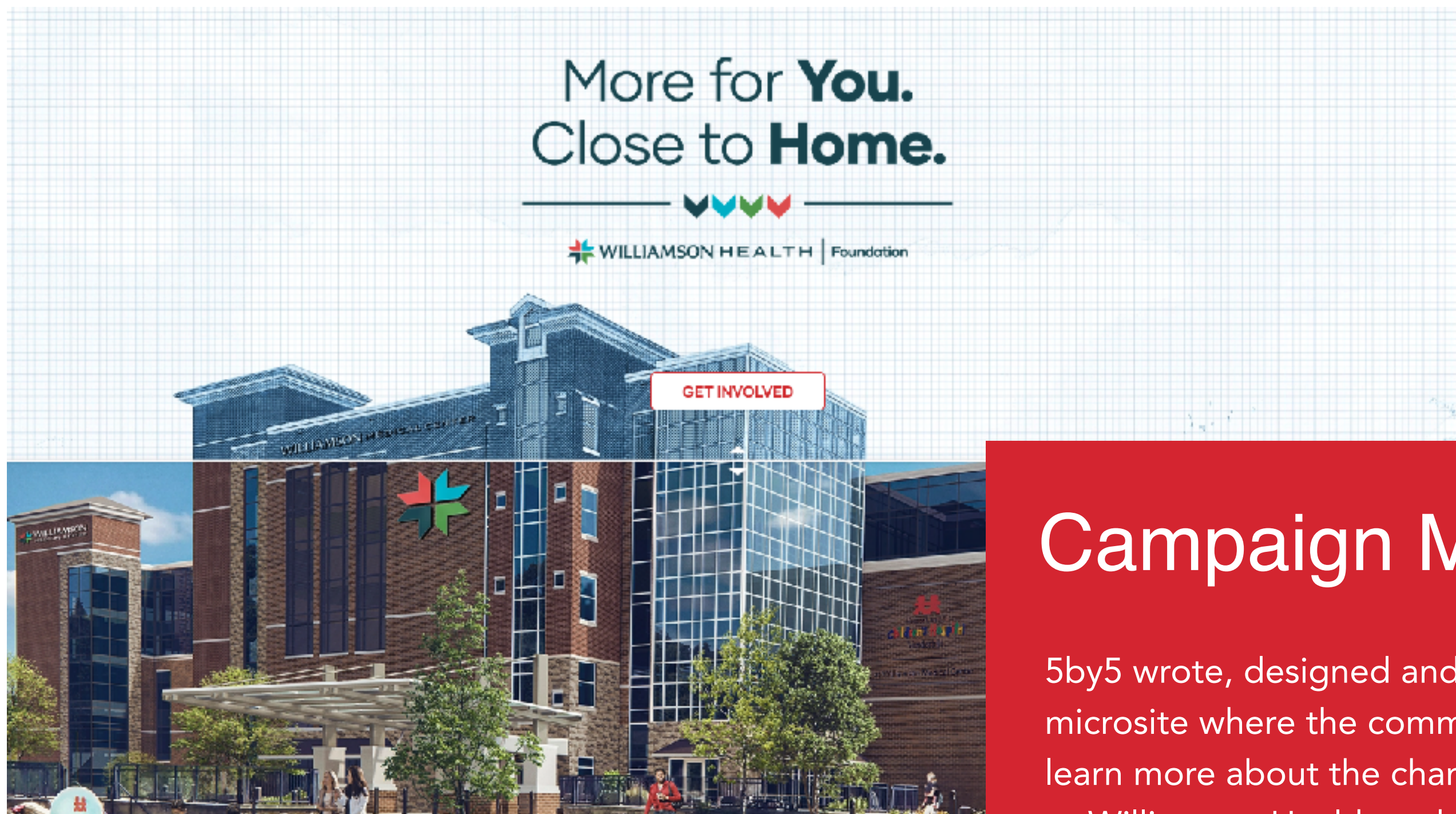
Billboard creative

RESULTS

Case for Support

5by5 strategized, wrote and designed the case statement to be presented to large donors throughout the campaign. The case for support was also rebranded early in 2023.

This includes the history of Williamson Health, explanation of the exceptional services offered, details of the expansion and renovation and a strong call to donate.



Campaign Microsite

5by5 wrote, designed and built a digital microsite where the community can learn more about the changes coming to Williamson Health and how they can get involved.

RESULTS

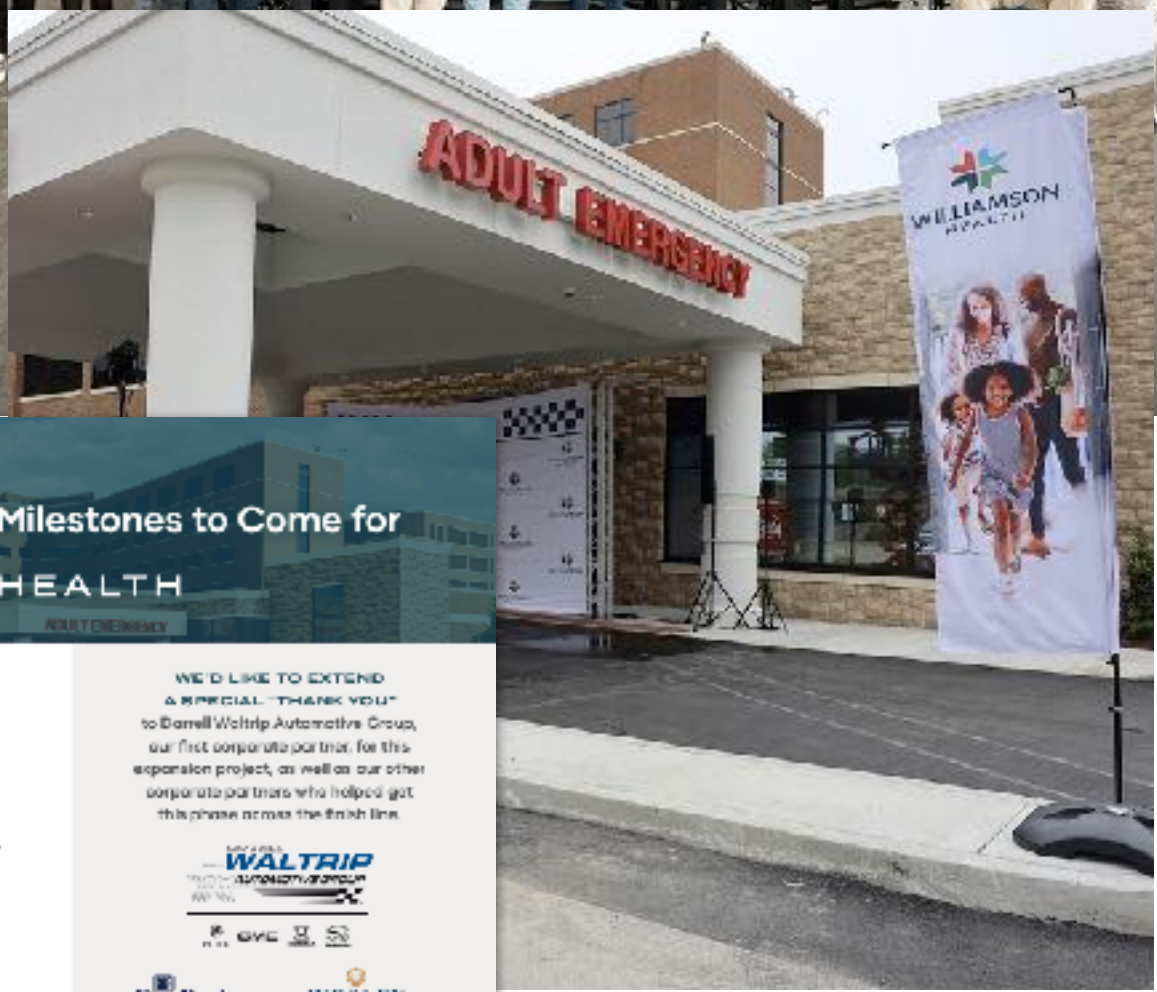
Groundbreaking Planning, Project Management and Execution

The 5by5 team project managed and created assets for the groundbreaking event in April 2022. This included:

- Running weekly meetings with all Marketing and Foundation team members and contractors
- Designing and printing step and repeat, building renderings and directional signs
- Designing employee T-shirts
- Designing and coordinating attendee gifts



RESULTS



Celebrating the First of Many Milestones to Come for
WILLIAMSON HEALTH

Since 2021, Williamson Health has been moving forward on a historic expansion and renovation plan – a \$200 million project at Williamson Medical Center (WMC) that will strengthen our ability to continue to provide exceptional healthcare to our region by modern, innovative and state-of-the-art facilities. This project demonstrates our commitment to our mission, vision and values in meeting the healthcare needs of Williamson County now and for years to come.

WE'D LIKE TO EXTEND A SPECIAL "THANK YOU" to Dorell Waltrip Automotive Group, our first corporate partner for this expansion project, as well as our other organizational partners who helped get this phase across the finish line.

Today, we are thrilled to be celebrating the first of many milestone moments in this transformational hospital project as we reveal the first phase – our modern, innovative adult emergency room (ER), including:

- New Adult ER entrance
- Expanded waiting room
- New registration desk with (3) private stations
- (2) triage rooms
- (10) new exam rooms
- Private family gathering room
- New conference room in main lobby
- Outdoor healing garden courtyard, opening soon
- Expanded and renovated Gift Shop in WMC main lobby

ER Ribbon Cutting Planning, Project Management and Execution

The 5by5 team project managed and created assets for the ER ribbon cutting event in May 2023. This included:

- Running weekly meetings with all Marketing and Foundation team members and contractors
- Designing Race to the Ribbon type treatment
- Designing event assets such as printed invitations, event backdrop, feather flags, directional signs, table runners and ribbon
- Designing employee and attendee gifts including sticker, pennant and project one sheet

Race TO THE Ribbon



invites you to celebrate the first phase of the newly expanded and renovated Williamson Medical Center Adult Emergency Room!

WEDNESDAY

05 - 17 - 23

4321 Carothers Parkway
Franklin, TN 37067

Ribbon-cutting program featuring special guests begins at 10:30 a.m. Please gather at the finish line ribbon near the ER.

PLEASE RSVP TO
events@williamsonhealth.org

More for **You.**
Close to **Home.**



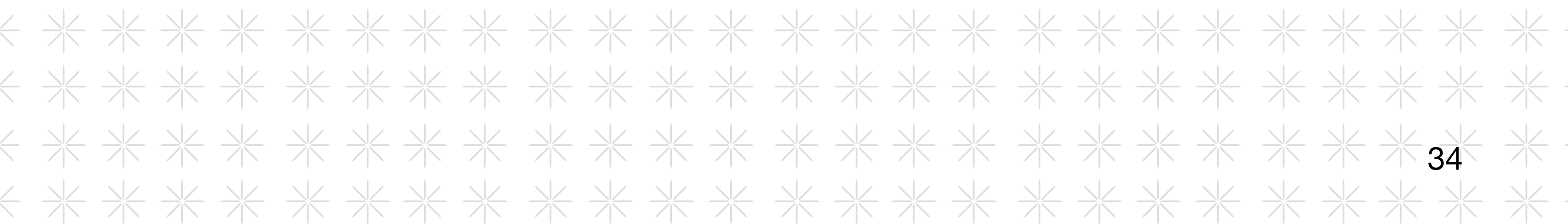
Thank you for joining us as we celebrate the first of many state-of-the-art improvements to our flagship hospital.

EVENT PARKING

FINISH LINE



RESULTS

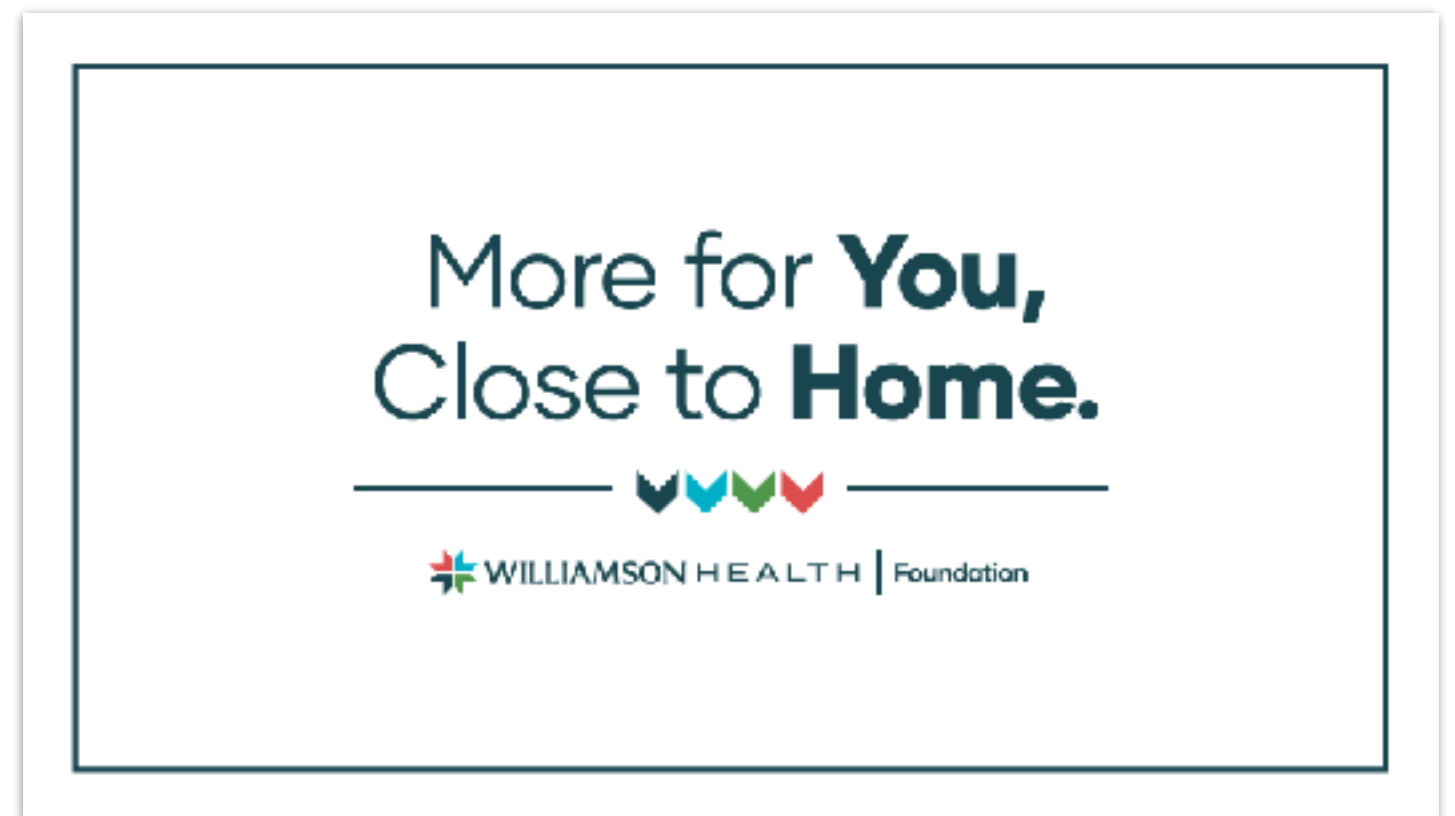


RESULTS

Staff and Volunteer **Assets**

As the Foundation staff, board and volunteers meet with donor prospects, 5by5 provided the team with assets such as:

- Business cards
- Letterhead
- Email signature template
- Proposal template
- Commitment card
- Thank you notes



Doctors' Day **Mailer**

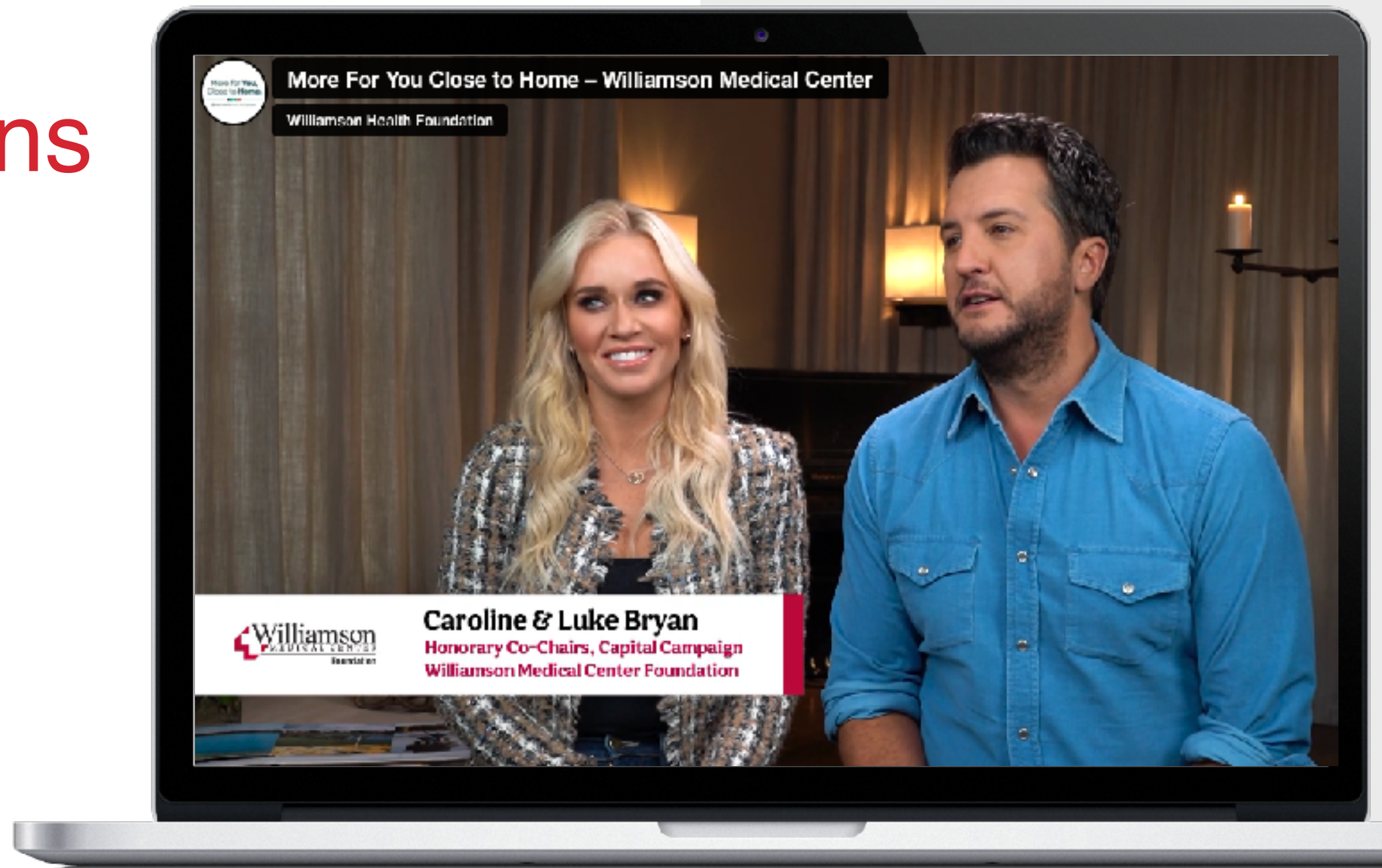
The 5by5 team wrote and designed a mailer to be sent out to Williamson County residents to raise funds for Doctors' Day in honor of the incredible Williamson Health doctors.



RESULTS

Video Recommendations and Assets

5by5 *partners with Williamson Health's video provider, Video Story Productions, to produce campaign videos. 5by5 designed the title slides and lower thirds for all videos.



*5by5 has in-house full-service video capabilities, but we also can partner with other outside vendors our clients have an established relationship.



Campaign One Pager

As a campaign asset and takeaway from the groundbreaking event, we wrote and designed a one pager summarizing the capital campaign.

RESULTS

Assist in Relationship with Luke and Caroline Bryan

5by5 assists the Foundation and Marketing teams on the relationship with Luke and Caroline Bryan, including:

- Writing a memorandum of understanding (MOU) at the start of the partnership. As part of this, the Bryans have agreed to several touch points with the Foundation and large donors
- Working closely with the Bryans' team to design co-branded merchandise
- Creating storyboards for the commercial featuring Luke, Caroline, and Darrell Waltrip



Volunteer Program Branding



As the Volunteer program has transitioned to a Foundation entity, 5by5 began work on branding the Volunteer program to give it a sense of belonging. We created a look and started designing merchandise and look forward to continuing this project.

RESULTS



4321 CAROTHERS PARKWAY, SUITE 604
FRANKLIN TN 37067

Dear Friend,

It has been my privilege to live, work and serve in Williamson County for 40 years. I've witnessed this area's transition from a quiet, rural neighborhood to one of the most desired places to live in the country. Through it all, Williamson Health has been there – passionately dedicated to serving its community with high-quality, compassionate care.

Williamson County and the surrounding regions are unique because they offer a small-town feel mixed with city sophistication, great schools and quality healthcare. In fact, more than 500 people move here every month to become part of the fabric of our area. While population growth is exciting, it also means this community's healthcare needs are growing along with it.

This region's residents deserve nothing but the best when it comes to their healthcare, and it has been Williamson Health's mission from the beginning to provide the high-quality, compassionate care they are seeking.

The heart of Williamson Health is unmatched by anything; this truly is a special place. Now it is time for the physical plant to match the core of who we are, and this world-class renovation and expansion will do just that.

Of course, a project of this size is a joint effort. Will you join us in our commitment to leaving a lasting legacy for our families, friends and neighbors? With your support, we can bring the standard of excellence you've come to expect from Williamson Health to all the region for many generations to come.



Sincerely,
Vicki McNamara
CAMPAIGN CO-CHAIR



"Our mission is simple: to provide high-quality, compassionate care to the communities we serve. This project reaffirms that commitment to meet not only current but also future healthcare needs of our growing community, which we will achieve through broadening and enhancing our physical plant while also offering even greater access to higher acuity services."

Phillip J. Mazzuca, D.Sc., FACHE
CHIEF EXECUTIVE OFFICER
WILLIAMSON HEALTH

Corporate Communications

More for You.
Close to Home.



Campaign Leadership

Foundation Leadership

Leigh Williams, MPA, CFRE
EXECUTIVE DIRECTOR

Rachel Caudle
ANNUAL GIVING MANAGER

Foundation Board of Directors

Vicki McNamara, Chair
Pam Stephens, Vice Chair
Phil Mazzuca, Secretary
Larry Westbrook, Treasurer
Phyllis Molyneux, Board Compliance
Jerry Batte
Hamilton Bowman
Mary Kate Brown
Bo Butler
Jeff Carson
Lynn Dugas
Richard Herrington
Michael Kaplan
Jim Lackey
Colin Looney, M.D.
Lisa Nierste Morris
Charles Pareigis
Jamey Parker
Jodi Rall
Jeff Walker

Capital Campaign Committee

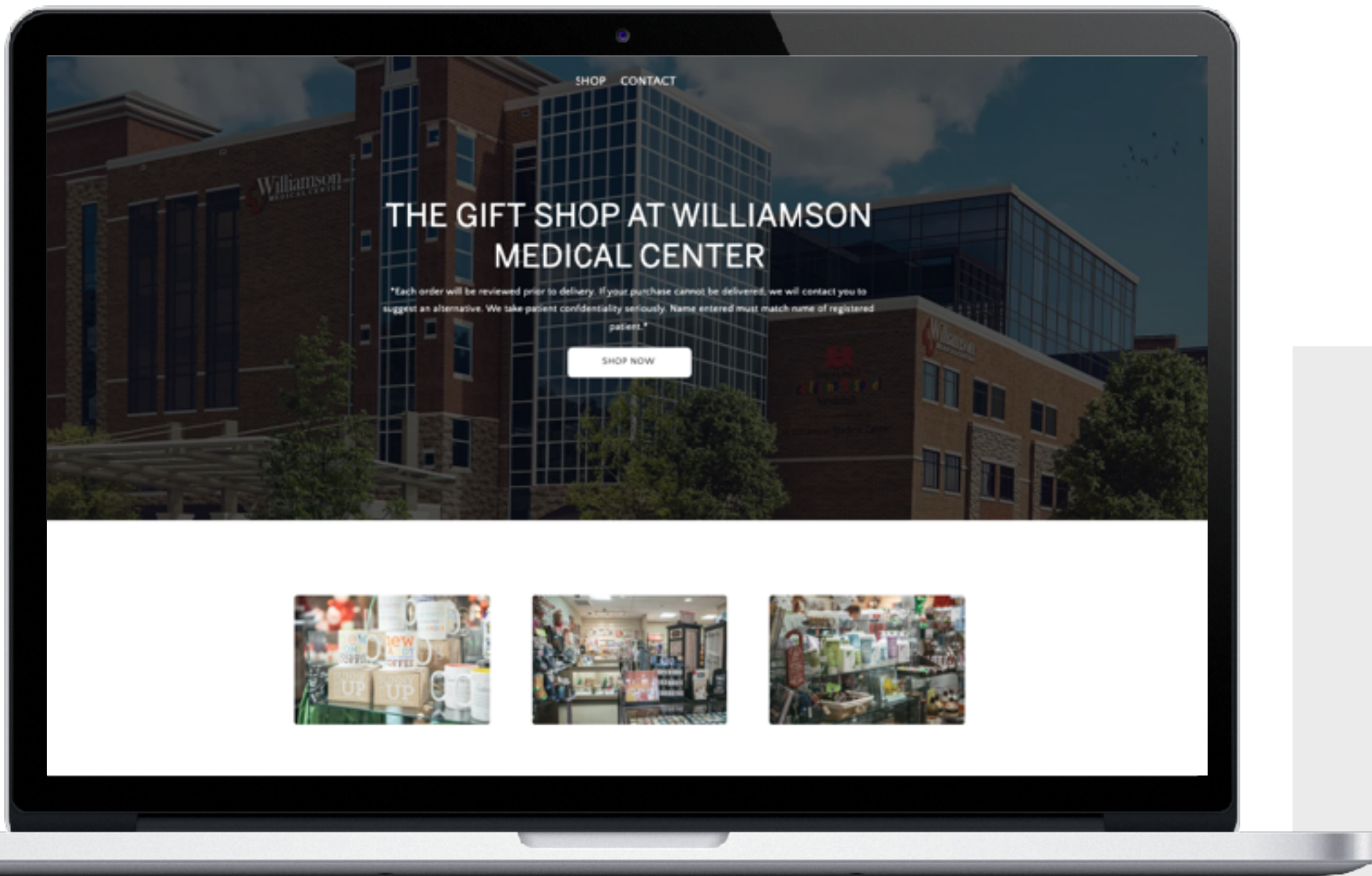
Vicki McNamara, Co-Chair
Caroline Bryan, Co-Chair
Luke Bryan, Honorary Co-Chair
Josh Brown
Mary Kate Brown
Lynn Dugas
Lynn Ellington, M.D.
Star Evins, M.D.
Seth Hall
Richard Herrington
Michael Kaplan
Jim Lackey
Jamey Parker
Jodi Rall
Heather Rupe, D.O.
Andy Russell, M.D.
Michele Simpson
Pam Stephens
Jeff Walker
Larry Westbrook
Nathan Zipper

Williamson Health Executive Leadership

Phillip J. Mazzuca, D.Sc., FACHE
CHIEF EXECUTIVE OFFICER

Andy Russell, M.D.
CHIEF MEDICAL OFFICER

RESULTS



Gift Shop Website

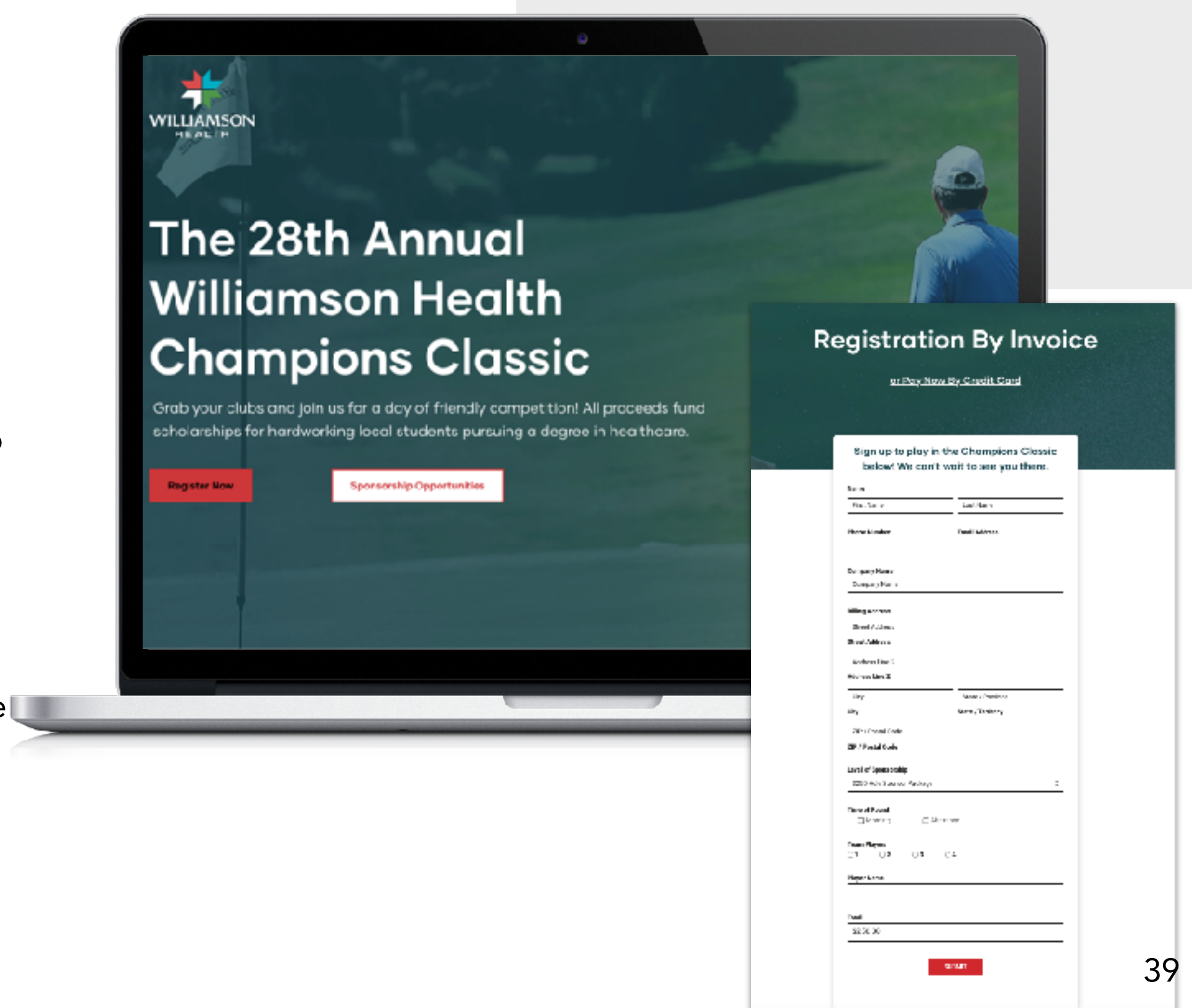
5by5 built an online shopping experience for the Williamson Health website. This allows loved ones from near and far to purchase gifts to be delivered to patients' rooms or picked up onsite for delivery elsewhere.

Creating 2023 Golf Tournament Website

5by5 partnered with the Foundation to create the 2023 golf tournament website.

This includes essential information on the tournament, testimonials from scholarship recipients and the ability to register by invoice or credit card.

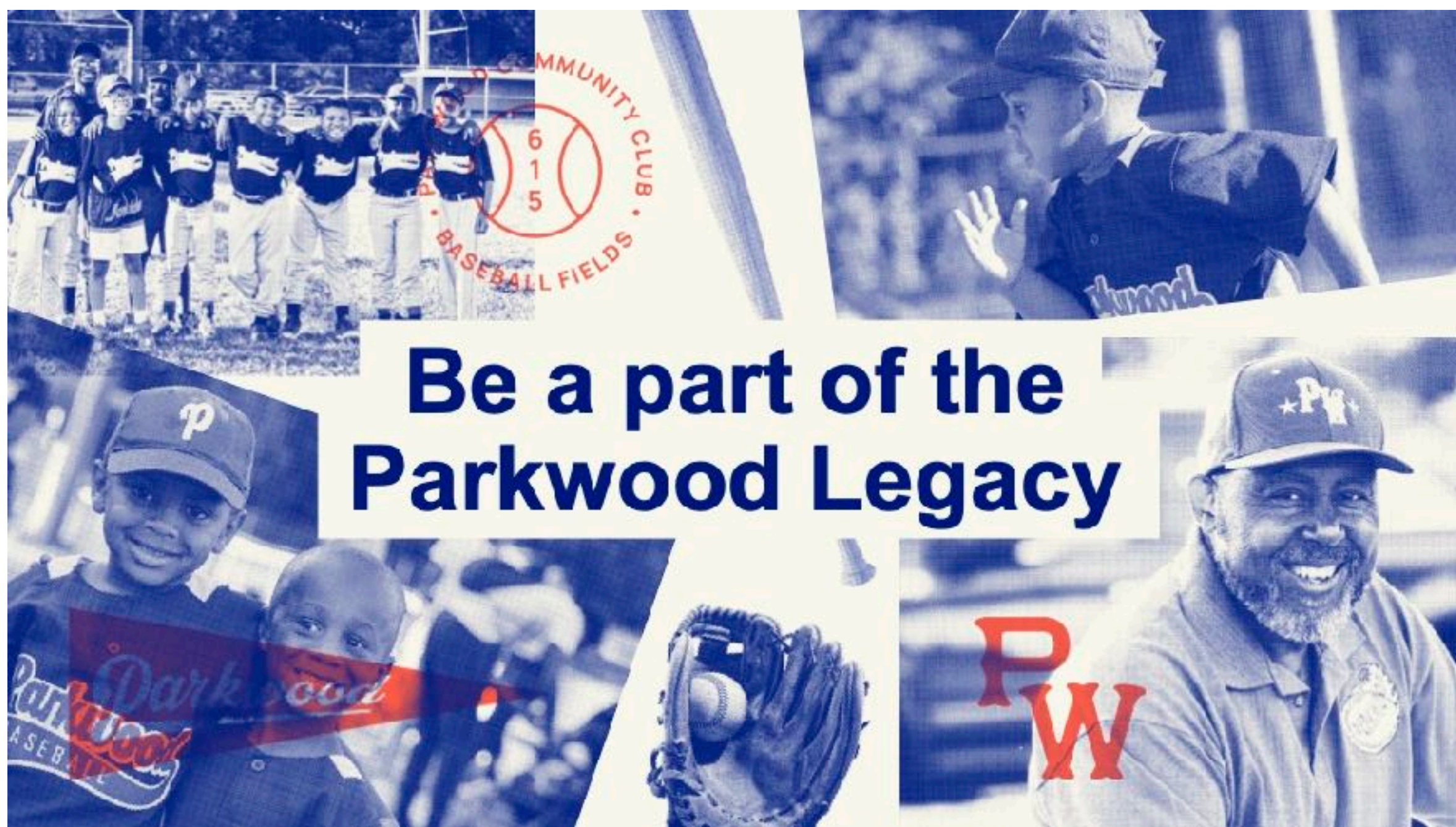
This website was set up in a way that gives the Foundation clear insight into the sponsorships selected so they can best serve sponsors and attendees.



HABITAT FOR HUMANITY
OF GREATER NASHVILLE

5BY5 STRENGTHENS OUR
COMMUNITY BY

honoring the past



Local Market Fundraising Campaign

Habitat for Humanity of Greater Nashville is one of the largest Habitat for Humanity affiliates in the nation. They serve middle Tennessee in a myriad of ways, but their commitment to community and neighborhood flourishing sets them apart. So when they committed to their next neighborhood it only made sense to honor and restore the adjoining community ballpark.

In the heart of Nashville, Parkwood Ballpark has been making history since 1966 – changing the game on and off the field for the community and nationwide. Parkwood was the first Black-owned sports complex in Tennessee and remains one of only five Black-owned sports complexes in the country. This field is not just a place to play baseball, it's home to the first fully integrated little league team in the Southeast. It's a symbol of unity and a testament to the power of community. It's an important part of history that cannot be allowed to disappear.

That's why Habitat for Humanity of Greater Nashville, along with a group of dedicated community members, is leading the charge to restore the Parkwood Ballpark to its former glory. And they brought 5by5 in to help.

5by5 came alongside the Habitat team to create streamlined campaign messaging and associated assets to deploy all across Nashville. The partnership included creative concepts, a fence wrap, a pitch deck and a compelling campaign video.

The results are still being measured today - however, up to this point Habitat has raised exactly 50% of the \$3.4M goal. And this spring they plan to start work on the first set of ballfields, ensuring this community staple will be around for generations to come.

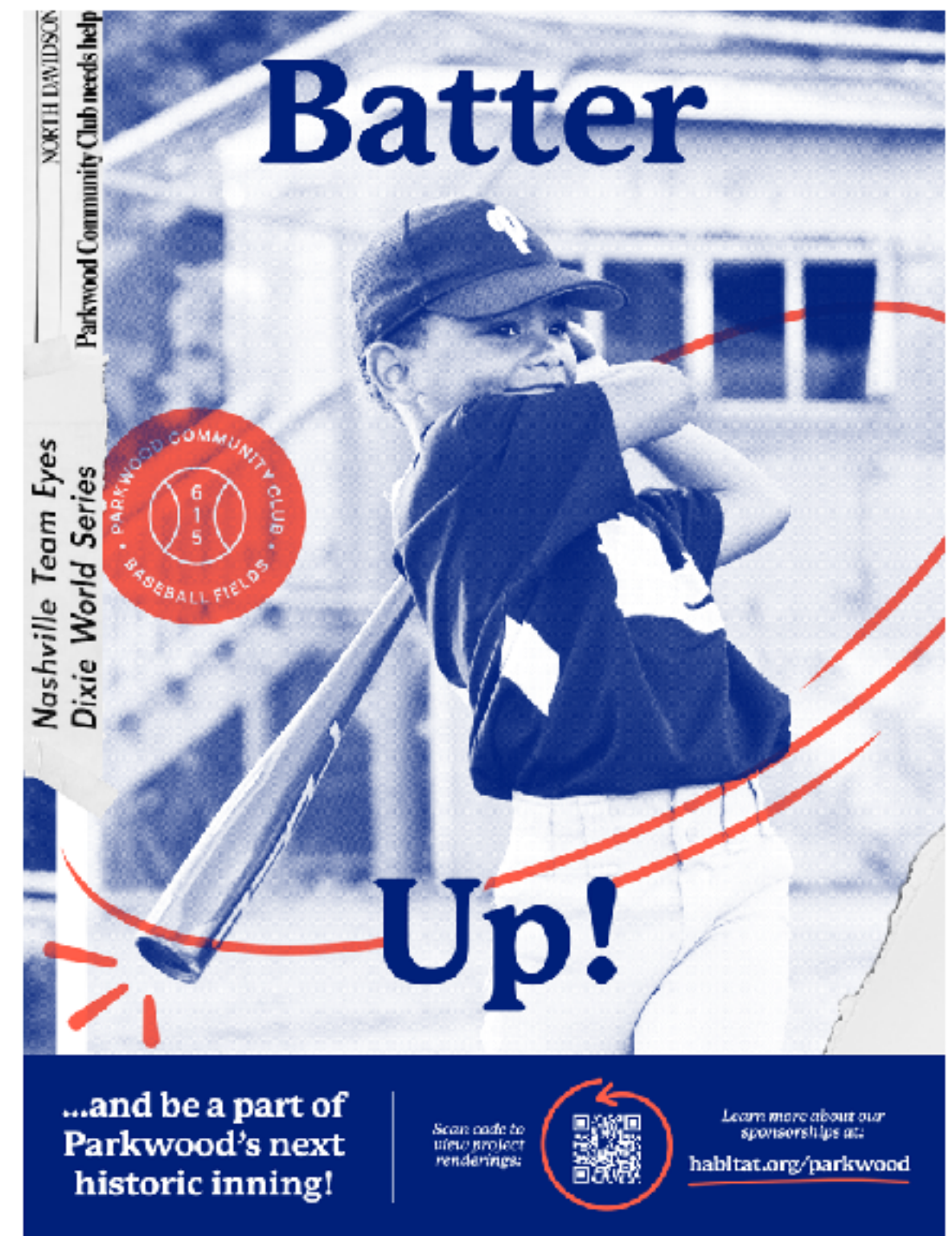
RESULTS

CAMPAIGN STORY + POSTER

From becoming the first Nashville-based baseball team to join the Dixie League in 1968, to eventually becoming the only African American franchise in that Dixie Youth League in 1973 (and winning three championships), and forming the first African American-owned youth sports complex in Tennessee (1984), Parkwood Community Club has a long history of changing the game – inside and outside of the baseball diamond.

Despite Parkwood's history of successful strides, it still has so much more to offer its community and the greater Nashville culture. If we work together, Parkwood's fields can offer decades of more wins, homeruns, high-fives, fastballs, coaching, sportsmanship and, most importantly, *opportunities* for the local kids, pre-teens and teens that have Parkwood as a positive sanctuary of community, recreation, and hope.

An investment in Parkwood, is an investment in the next generation of game-changers and our community as a whole. We invite you to learn more about the project and be a part of Parkwood's next inning in Nashville history, today.



RESULTS

Parkwood



P
W

PARKWOOD COMMUNITY CLUB
BASEBALL FIELDS

ESTD  1966

NASHVILLE, TENNESSEE



P
FIELDS





TESTIMONIAL

"5by5's ability to work collaboratively with our team to create the right story for the campaign was critical to the project's success.

They understood how to incorporate their knowledge of what truly speaks to our Nashville community with compelling messaging that was clear and yet did not water down the textured historical details of the story.

They were a true extension of our team working alongside us and celebrating our progress every step of the way."

**Sherry Stinson, SVP of Brand Engagement,
Marketing and Public Relations for
Habitat for Humanity of Greater Nashville**

NATIONAL SEATING & MOBILITY

MOVING A BRAND TO THE **next level**



Multi-Year Partnership

National Seating & Mobility (NSM) is the country's largest provider of power wheelchairs and accessibility products such as vehicle lifts, wheelchair ramps, and home modifications.

NSM is a large nationwide company, but the advertising they were conducting on a local branch-by-branch level wasn't efficiently leveraging their advertising budget. In short, they were spending too much money for not enough results.

5by5 dove into NSM's past campaigns. Combining historical data with our own industry knowledge, we developed a smarter bid strategy for NSM's Google Search campaigns and paired it with regional targeting and optimized call tracking tools. The goal was to reach the right people at the right time to maximize conversions while minimizing the amount of money it took to reach them.

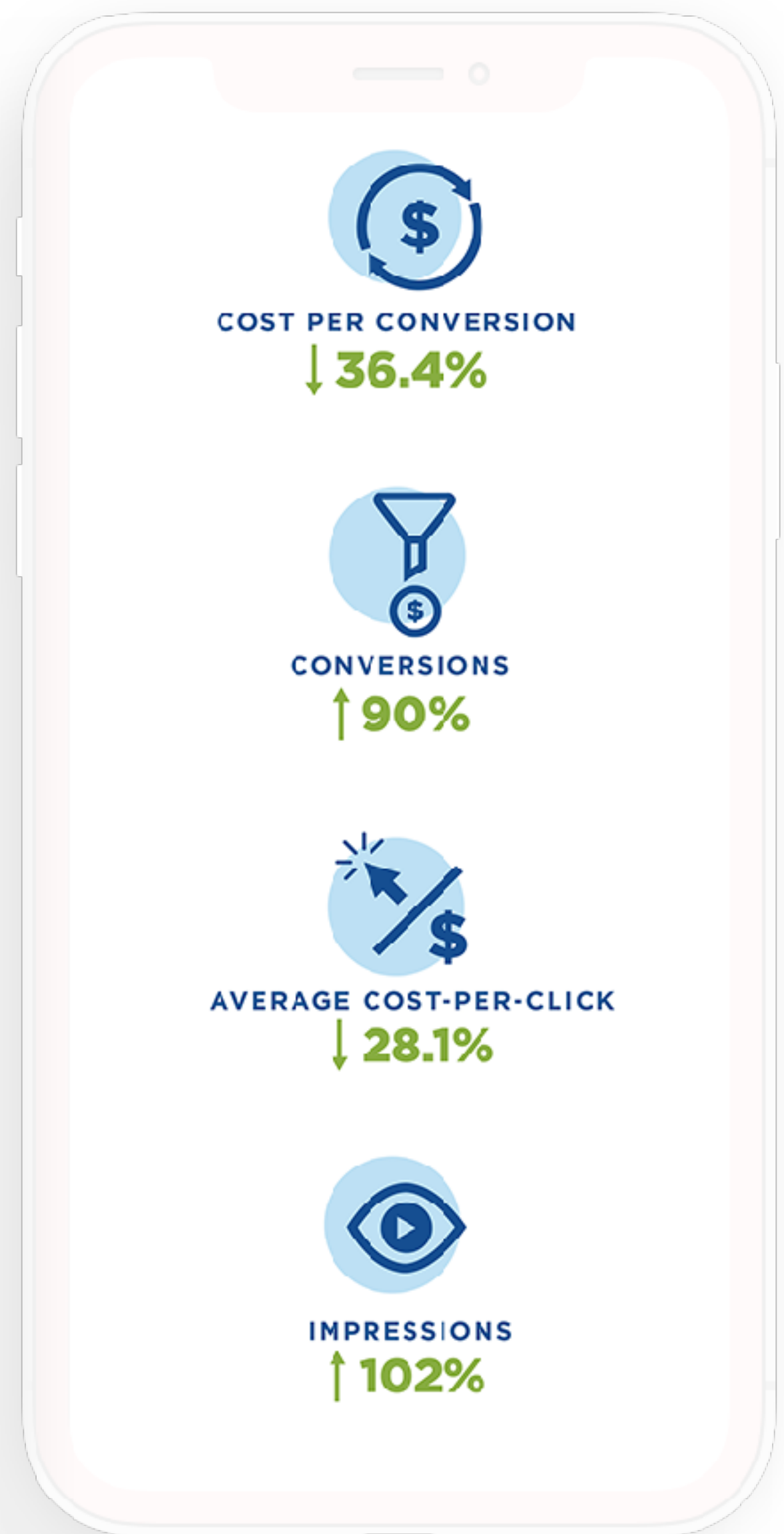
During the course of our partnership, NSM came to 5by5 with a second need that was much more brand-focused. NSM wanted to further entrench themselves as America's #1 mobility solution not just by the numbers, but in the minds of the people who use their products every day. This was about creatively building brand awareness and equity in ways their competitors weren't.

In response to NSM's need to build a stronger relationship with its audience, we embarked on a long journey to concept and produce the first two issues of their very own magazine: *Let's Get Moving*.

RESULTS

Patient Acquisition Campaign

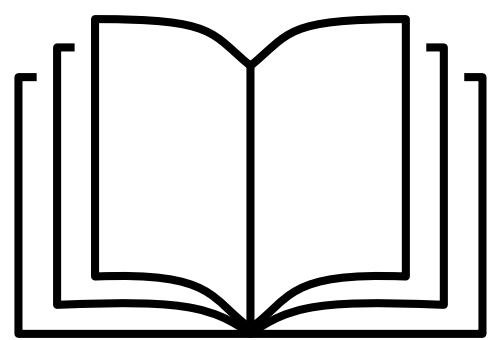
Through our efforts, we were able to achieve the lowest cost-per-conversion in NSM's history, allowing their advertising budget to be more efficient and reach more people than ever before.



RESULTS

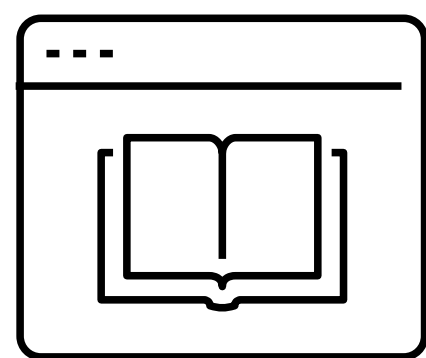
Let's Get Moving Magazine

5by5 took the lead on strategy, messaging, video production, layout, and design. It was critical to get the inaugural issue right, because it was the template from which all future issues would be built.



100K

hard copies
distributed nationwide



20K+

digital impressions

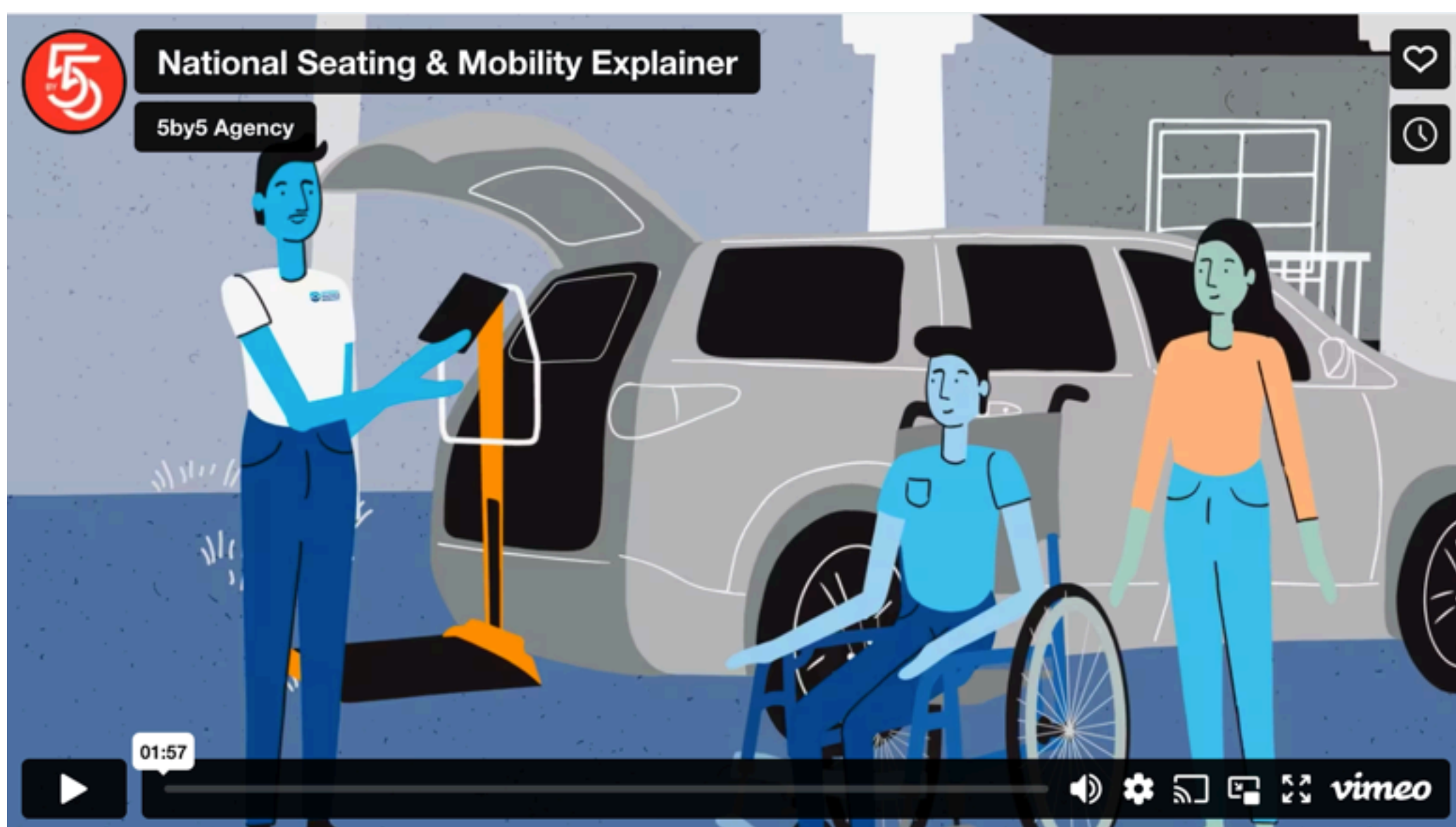


RESULTS

Let's Get Moving Video Creative



Move the World Campaign - <https://vimeo.com/644959104/1d6fcd664f>

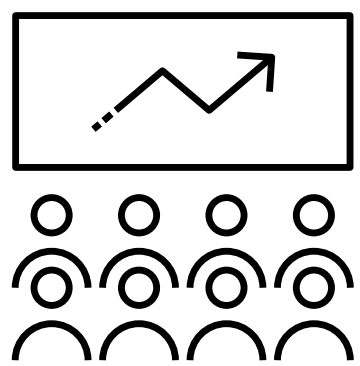


Explainer Video - <https://vimeo.com/644933269/c6cfbad9ae>

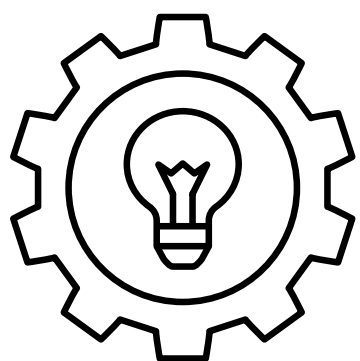
RESULTS

2022 NSM Symposium

NSM also asked 5by5 to shepherd its biggest internal event of the year, Symposium. The hybrid event offered entertainment and education, as well as inspiration and alignment for employees.



500 in-person attendees



2,000 virtual attendees





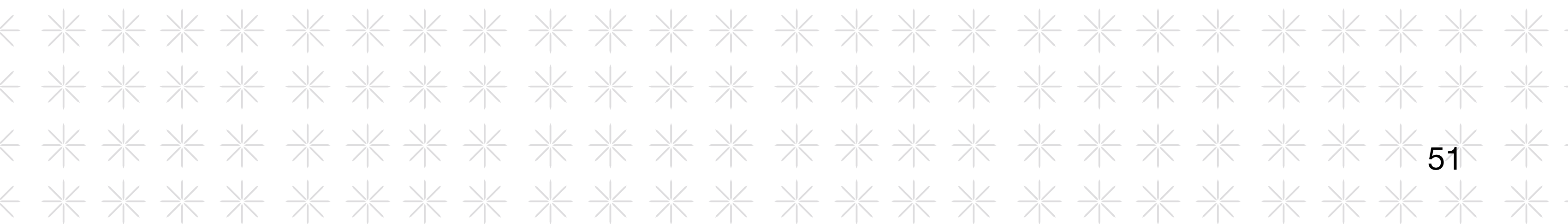
TESTIMONIAL

“We engaged 5by5 at a time of extreme growth. Their ability to meet us where we are is exactly what we need in a partner.

They consistently bring smart strategy, flawlessly execute and always focus on proving out ROI.

5by5 is truly an extension of our marketing team and we are so thankful for their partnership.”

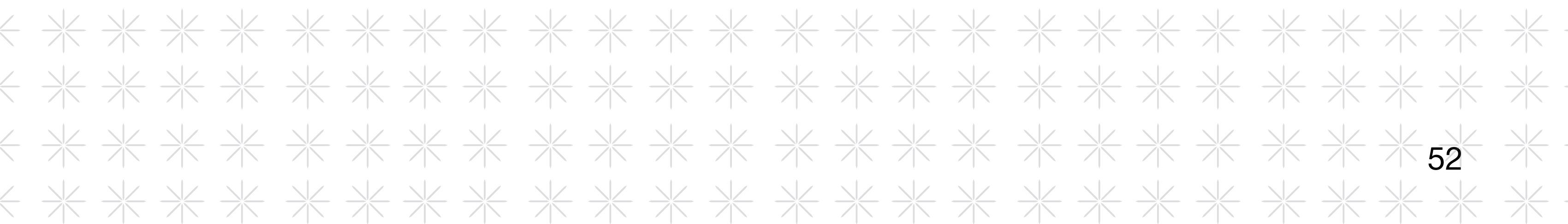
**Rachael Crocker, Director of
Marketing at NSM**



— ADDITIONAL EXPERIENCE

BUT, WAIT, THERE'S

**more
campaign
experience**



ADDITIONAL EXPERIENCE

LINCOLN HEALTH SYSTEM

Lincoln Health System is one of the few remaining county-owned hospitals, located in Fayetteville, Tenn., maintaining a high priority on community and personal, compassionate care.

Formerly Lincoln County Health System, the far-reaching system engaged 5by5 to further clarify its brand and establish it as the premiere center for patient care in the area.

To inform the future marketing strategy, 5by5 first implemented market research to gain a better understanding of the perceptions of the system, both internally (employees) and externally (community).

5by5 conducted both qualitative and quantitative research through an employee 5-point scale survey and community focus groups in addition to industry competition research and analysis.

Through this research, it was discovered that Lincoln Health System's employees value their commitment, teamwork and compassionate care as well as the fact that they are local and community-focused.

However, LHS was also in need of a clear vision embraced by all employees, and communication from leadership was low. The community, however, actually considered the service poorly delivered and desired more professionalism and better customer service. Yet they did perceive the system as an overall added value to the community.

ADDITIONAL EXPERIENCE

In light of these findings, 5by5 recommended a complete rebrand — including the name change — as well as logo and new brand messaging to go with it. These strategies have strengthened internal culture under a shared vision as well increased patient acquisition better serving the community and keeping patients close to home for exceptional care.



View the overview video here: <https://vimeo.com/188687853>

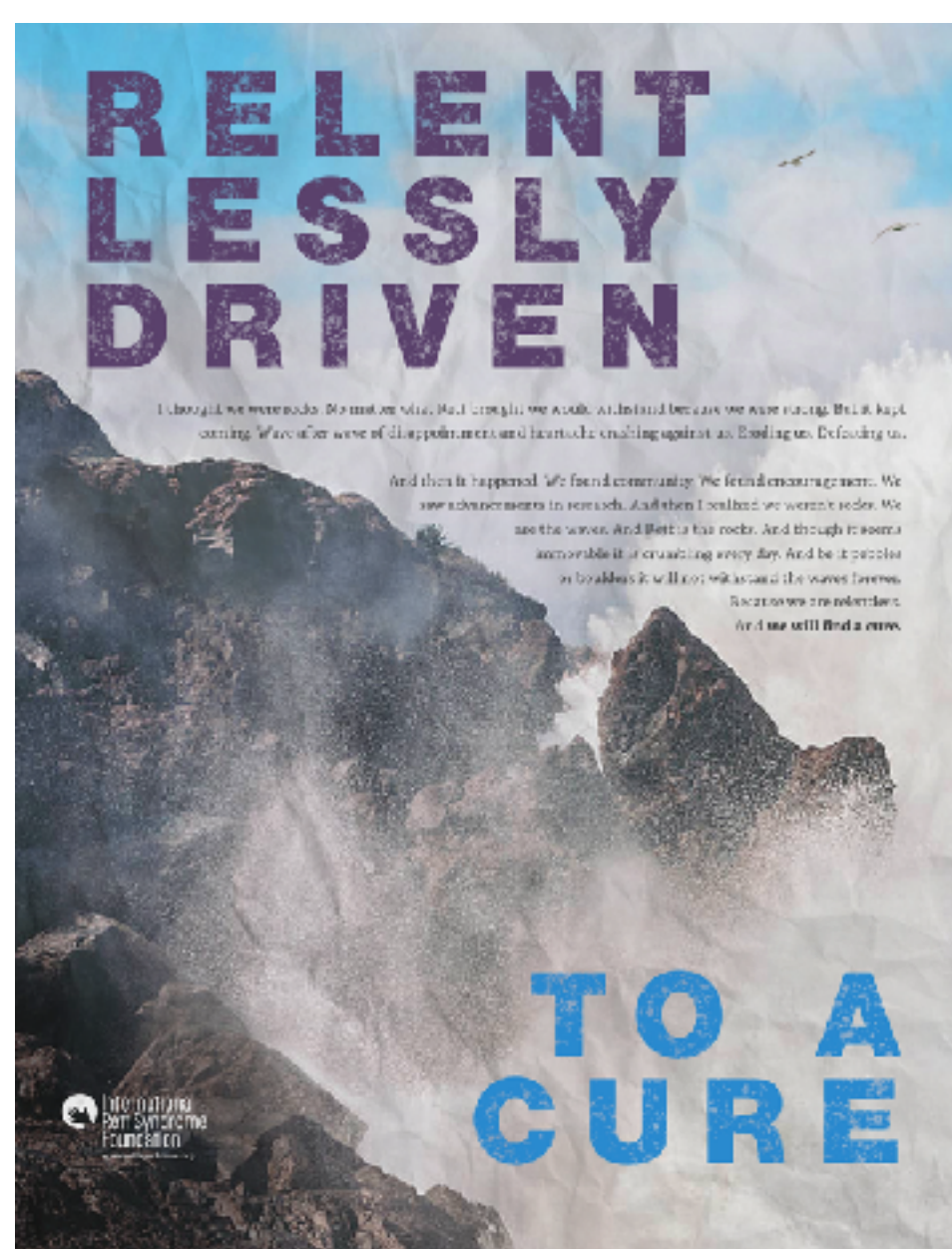


ADDITIONAL EXPERIENCE

INTERNATIONAL RETT SYNDROME FOUNDATION

The International Rett Syndrome Foundation (IRSF) is a rare disease patient advocacy organization with a two-prong mission: accelerate Rett syndrome research toward treatment and a cure and empower families affected by Rett syndrome. IRSF's mission is critical to families. We want a cure but need practical help along the way.

IRSF partnered with 5by5 ahead of launching a 3-year campaign to raise money for its science & research agenda. The research agenda was changing, and the organization needed fresh, exciting language that generates credibility and buy-in in the community and spurs them on to give.



Creative Concept Options

ADDITIONAL EXPERIENCE

In partnership 5by5 provided three campaign concepts leading to the final approved "All In" campaign theme. From this theme we collaboratively derived a comprehensive marketing campaign with multiple assets including an explainer deck, digital advocate toolkit, crowd-sourcing strategy, social media graphics, campaign overview video and microsite.

ALL IN FOR *a cure*

The International Rett Syndrome Foundation (IRSF) is dedicated to accelerating a cure and fighting for the families dealing with Rett Syndrome every day.

We need your help to raise \$29 million by 2024 to advance treatments and a cure for those with Rett syndrome.

We're going ALL IN for a cure, for families, and individuals with Rett all over the world.



IRSF Funded Discoveries

-  The discovery of which gene causes Rett (called MECP2)
-  Rett is reversible in mice
-  Advanced 2 compounds to late stage clinical trials
-  Companies investing in the fight to find a cure have grown from 1 to 20 (1900%) in 8 years

We've been changing the game *for decades*

Through the support of our donors, IRSF has been investing in projects that profoundly impact foundational Rett syndrome research, resulting in discoveries and partnerships critical to our mission of finding a cure.

Together, let's go ALL IN and make sure no family faces Rett syndrome alone.

As we relentlessly pursue a cure, we come alongside families with support, wherever they are on the journey. Each of them face constant challenges, heartache and disappointments. They all need compassionate and practical support, effective treatments and ultimately, a cure.

You can meet those needs by helping us take incredible strides forward in much-needed research – right now.

Together, we can raise **\$29 Million** over the next three years to make critical advancements toward treatments and a cure for those with Rett Syndrome. We can provide solutions for every family fighting Rett – but only with your help.

- 1** Increase investments in ground-breaking research that provides the promise of new therapeutics
- 2** Advance research to flood the pipeline for treatments and a cure
- 3** Enhance clinical trial success and expand care for all those in need.

Let's go all in. For a cure. For families. For individuals with Rett, all over the world.

Will you go ALL IN for someone you love with Rett syndrome? Visit www.rettsyndrome.org/all-in to learn more or contact Tim Frank, Chief Marketing & Development Officer at tfrank@rettsyndrome.org.

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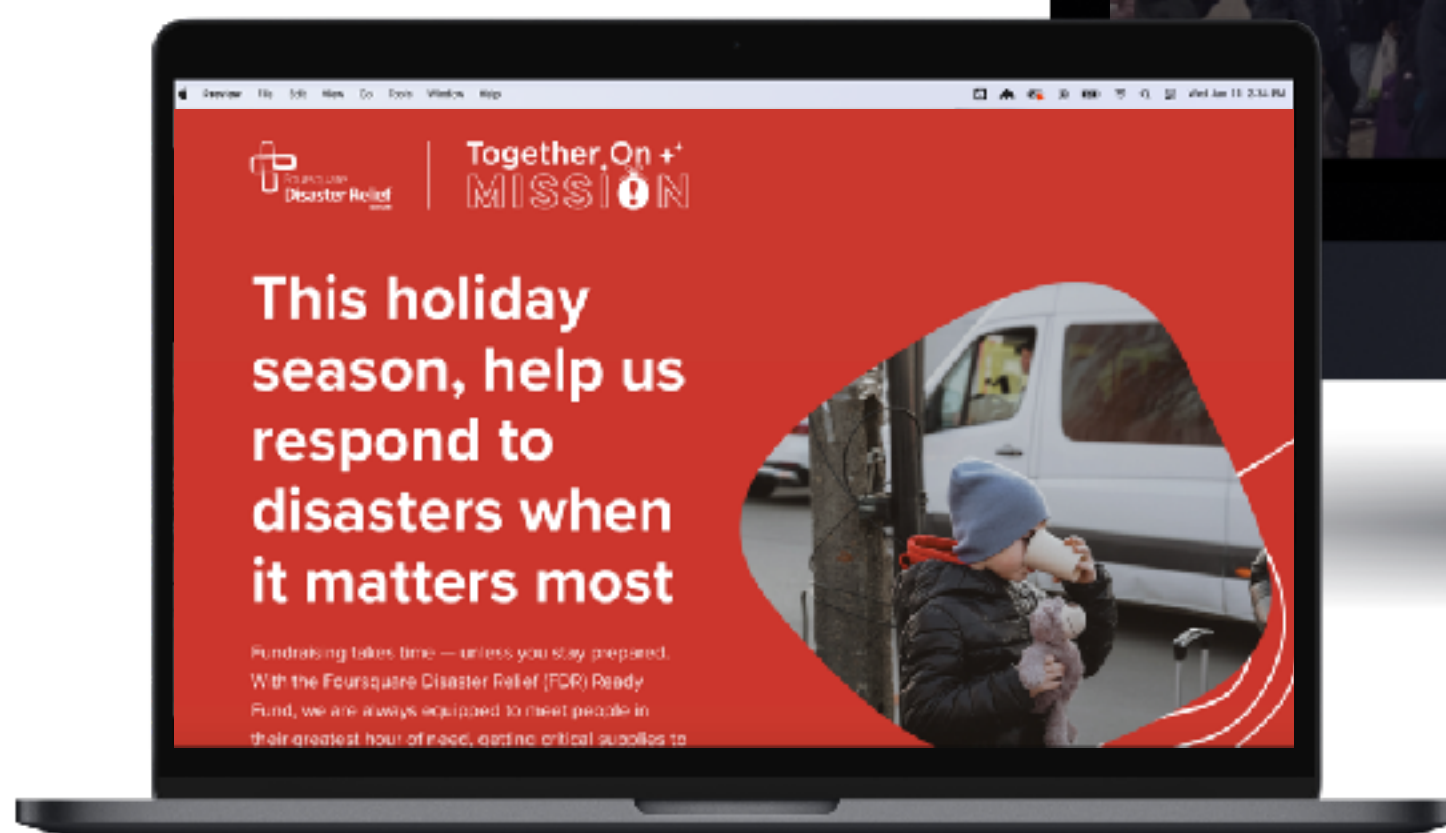
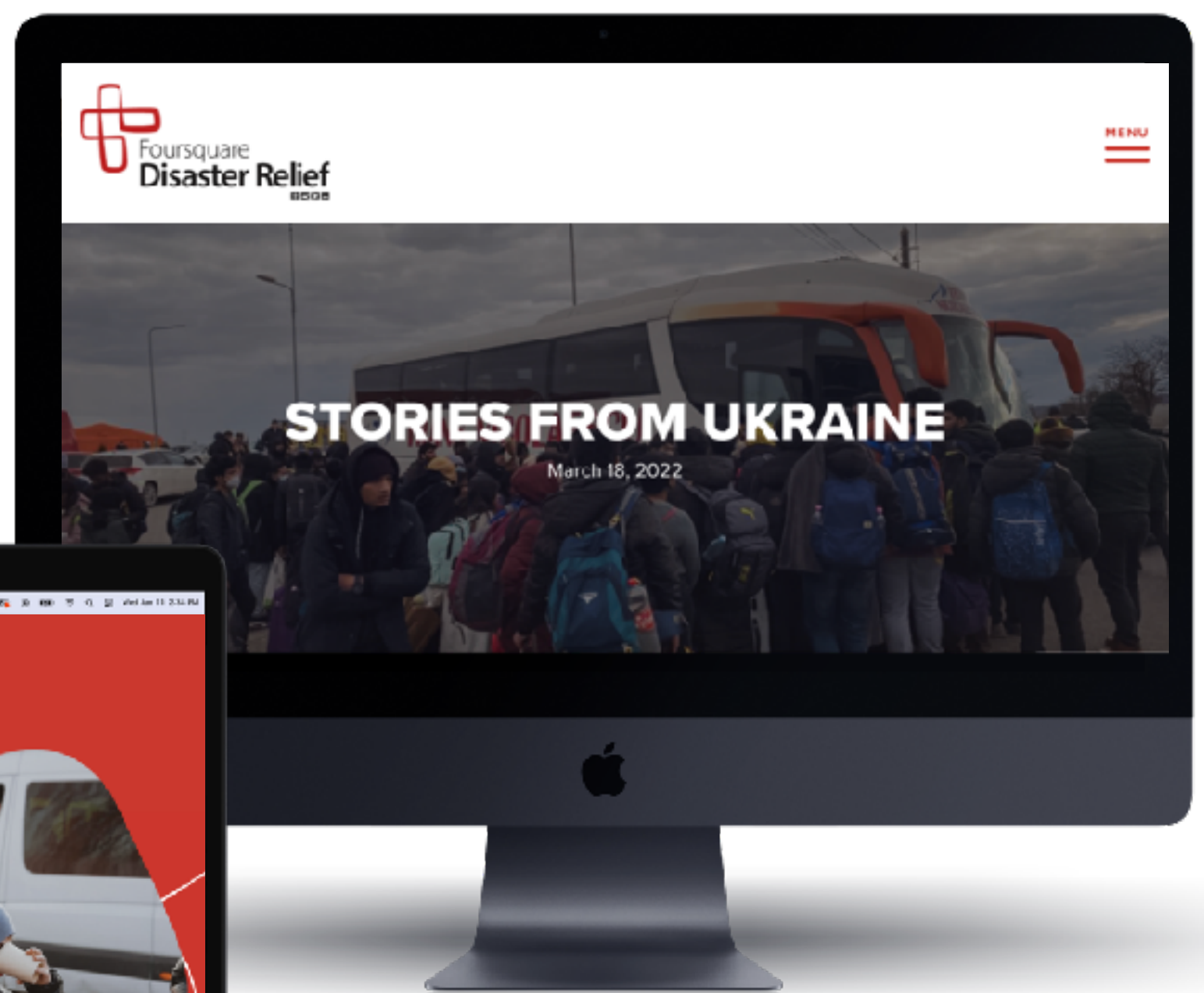
ADDITIONAL EXPERIENCE

FOURSQUARE DISASTER RELIEF

When Ukraine was invaded, Foursquare Disaster Relief sprung into action to support refugees. This non-profit needed a strategy partner to help them quickly reach donors and raise dollars.

We swiftly planned and created a new landing page, church communications and digital outreach including social media and emails to promote and facilitate giving opportunities.

Together, we **exceeded the goal** of raising **\$1M for Ukrainian refugees.**



ADDITIONAL EXPERIENCE

“5by5 has put Foursquare Disaster Relief in another league sharing what we do and the impact our partners are making with us! We are grateful for their **creativity, adaptability and capacity to handle the big and small projects we’ve thrown at the team.**”

Chad Isenhardt, Director



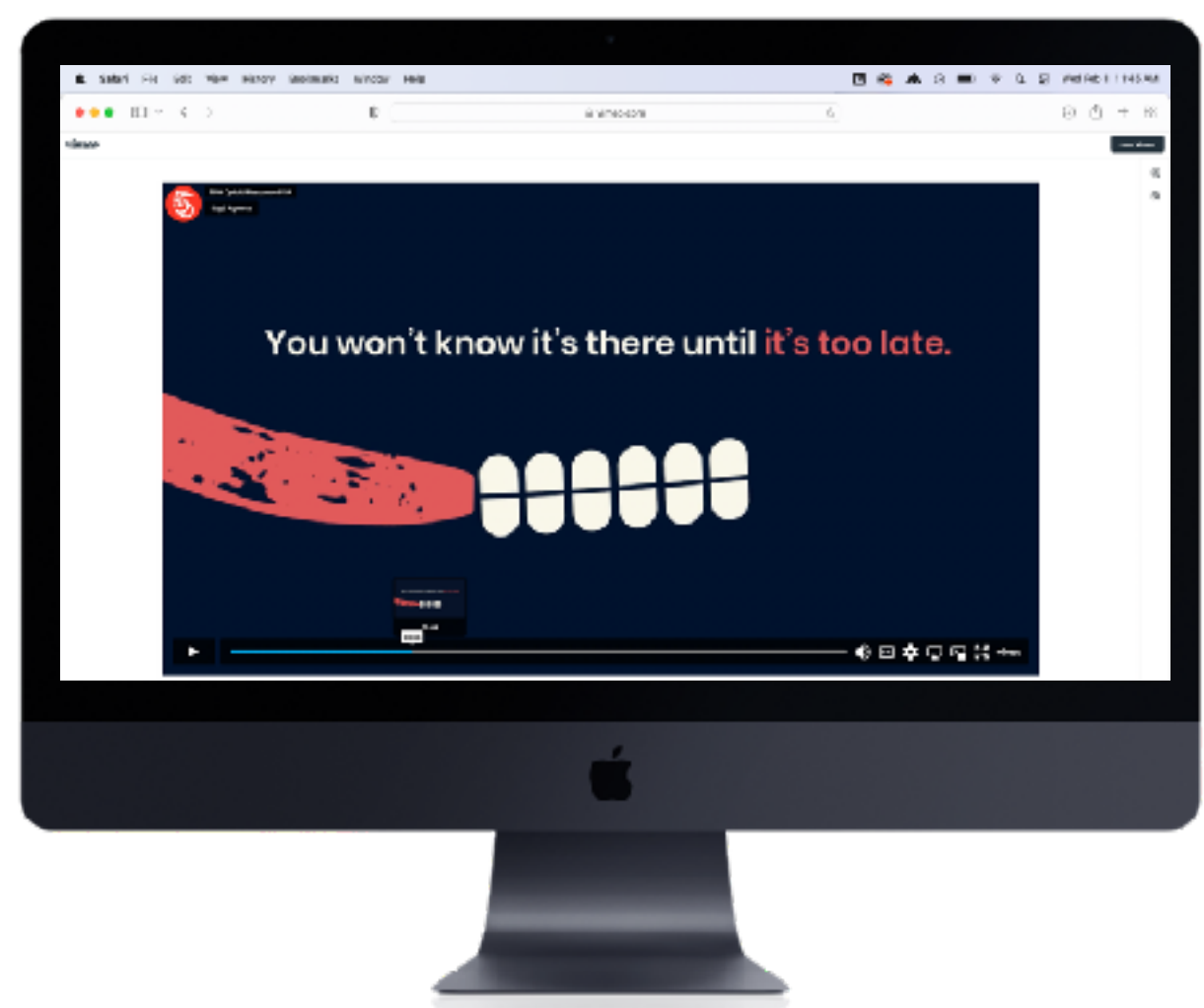
ADDITIONAL EXPERIENCE

TN DEPARTMENT OF HEALTH - OPIOID RESPONSE CAMPAIGN

Tennessee is among the hardest-hit states when it comes to the opioid epidemic. The State Health Department needed a creative partner to raise awareness of this staggering issue and reach the public with life-saving resources.

We designed an entire creative campaign including videography, social media assets, billboards, flyers and radio spots to grab people's attention and give them access to the help they need.

The opioid response awareness campaign generated **over 1M impressions** and an average **increase of 270%** in site traffic year-over-year. And, it **won a 2023 Aster Award**, the nation's most elite competition dedicated to recognizing the most talented healthcare marketing professionals for outstanding excellence in advertising, marketing and communications.



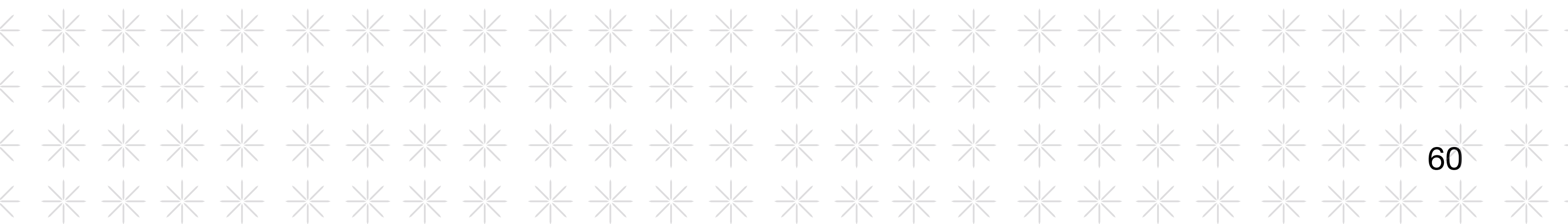
TN Department of Health Opioid PSA:
<https://vimeo.com/767430154/23fd3319f5>



ADDITIONAL EXPERIENCE

BUT, WAIT, THERE'S

**more
market
research
experience**



ADDITIONAL EXPERIENCE

5by5 has an in-house Market Research team making our agency your all-in partner for success.

5by5 Research is a division of the agency. Begun as Sightline Research + Strategies in January 2015, the organization was purchased by 5by5 in 2017 and became a full-service market research division of the company.

The division is overseen and guided by Mark McPeak (SVP of Research). Mark began his research career with RDA Group in Bloomfield Hills, MI. The company (later acquired by IPSOS) specialized in automotive market research working with Ford Motor Company, Caterpillar, Detroit Edison/DTE Energy, Pacific Gas & Electric, and other leading companies.

In Mark's 30+ years of experience he has worked on hundreds of projects and provided research, strategy, and consulting to all types of organizations. Specifically, 5by5 Research clients have included: Duracell, Zillow, Amazon Pet Care, Tennessee Titans (NFL), Harper Collins Christian Publishing, Williamson Health and many others.

Research to assess experiences, measure awareness, support content, curriculum and programs is a core competency of the 5by5 team. The professional research team has conducted many projects – both quantitative and qualitative – to support such efforts.

When our team clearly understands the business objectives of our clients, it is possible to craft and execute research that becomes very strategic. Listening to the voice of key stakeholders and customers is one of the best ways to avoid mistakes. Validating or invalidating our assumptions through reliable research can reveal blind spots or landmines which may not be discovered in any other way.

5by5 is a strategy first agency. When strategy is informed by data, our clients exponentially increase their impact.

ADDITIONAL EXPERIENCE

CONNECTED CAREGIVER COMMERCIAL MARKET TESTING

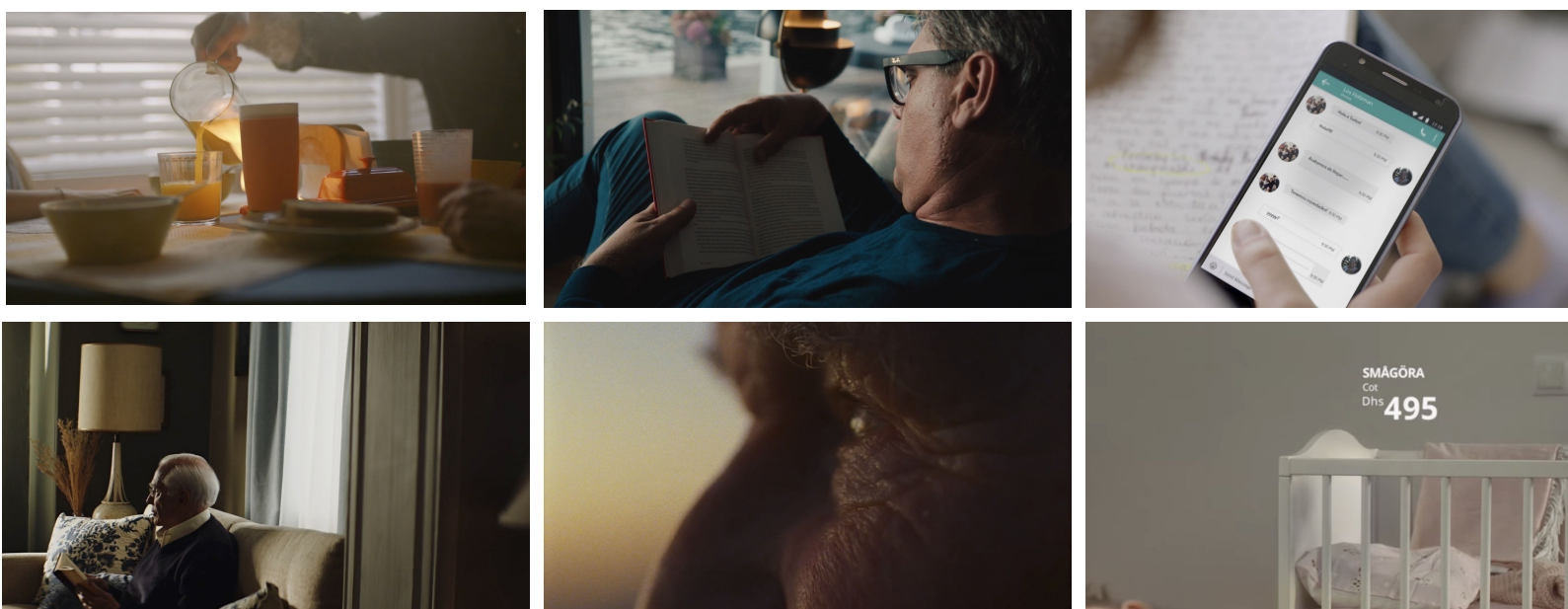
Family caregivers shoulder many of the same duties as professional caregivers, but usually with none of the necessary resources, training or community. The Connected Caregiver (CCG) app allows caregivers to manage tasks, coordinate care, & monitor their Loved One's health & safety — all in one place. The CCG team came to 5by5 pre-launch with comprehensive go-to-market strategy and creative needs.

5by5 dove in with primary market research, named the product, designed the brand, built the website, produced videos and created a roll out plan. Together, we launched a secure, reliable and user-friendly health monitoring system.

As we continue to work together to increase nationwide demand, the client asked us to produce a television commercial for the product. Prior to embarking on production, we recommended doing creative market testing utilizing pre-production video treatments in a focus group setting, recruited from their current customer base. From these focus groups, our team was able to refine the creative direction and produce the right commercial for optimal conversion.

[This commercial is currently in final post production, but we will have a final to show you should we make it to the presentation stage of the RFP process].

Moodboard



Setting the Stage

Connected Caregiver is ready to be introduced as the top nationwide choice for caregiver tech solutions that allow senior loved ones to more easily age in place, and we're thrilled to partner on this journey. Today, we present two treatments: one emotionally driven and the other emphasizing CCG's features. Today's market testing, we'll refine our approach.

ADDITIONAL EXPERIENCE

Two treatments were presented and tested comparatively.



Treatment

"Parallel Paths" unfolds through a split-screen narrative, showing the day-to-day of an elderly father and his adult son. As the day begins, the son is woken up by his kids, and he quickly checks the Connected Caregiver app. A motion graphic line moves from his phone over the split screen connecting to the Safety+ device on his dad's nightstand, with text popping up: "Safety+ Features: Fall Detection, SOS, First Motion of day. etc...". The Dad puts on the device and a "first motion of day detected" notification pops up on the adult son's screen simultaneously.

Both move to their kitchens. The son juggles making breakfast for his energetic kids, while the father enjoys his quiet morning coffee. The son's phone lights up with an alert. A bright motion graphic line extends from his side of the screen to the Connected Caregiver Prompter Pillbox on his father's kitchen counter, with on-screen text: "Prompter Pillbox: Medication Reminder, Dose Detection, Missed Dose Alert."

After seeing the alert, the son sends a quick medication reminder to his dad through the app. The Dad smiles in response while opening the Pillbox.

The day moves on, the son focused on his work a close up of his phone reveals a message in the connected caregiver app from his sister: "I'll drive Dad to the doctor tomorrow." The son types back, "Thanks! Remember to check the app for Dad's meds before the appointment." Graphics illustrate: "Family Chat: Share Appointments, Med Info, & Updates". On the split screen the father is relaxing with a book outside.

As evening arrives, both gear up for a workout. As they meet up outside Dad's house, the split screen fades, bringing the two together, father and son sharing a laugh and setting out for an evening outside walk together.

The story wraps up with the Connected Caregiver logo, representing the blend of tech, care, and family ties in today's world.



Treatment

The scene unfolds in a sunlit living room. An actor spokesperson, exuding warmth and reliability, faces the camera: "how do we support the safety and health of our aging loved ones, even from afar?" The scene briefly transitions to an elderly woman tending to her garden, wearing the Connected Caregiver device around her neck.

The spokesperson continues, "Enter Connected Caregiver's Safety+ — a harmony of safety alerts and health support." As the elderly woman bends to pick a flower, she loses balance and has a significant fall. Without delay, the device emits a sound and a calming voice inquires about her well-being. "For those significant moments, we're vigilant, offering timely support. And you? You gain immediate reassurance with prompt notifications."

Transitioning to a kitchen scene, the Prompter Smart Pillbox comes into focus. "Concerned about Mom potentially missing medications?" The Pillbox lights up signaling it's time, and the elderly woman retrieves her medicine. The spokesperson adds, "and if the Pillbox is not interacted with? You receive an alert and can follow-up."

Reverting to the inviting living room, the spokesperson introduces the Connected Caregiver app, "It's not just about monitoring; it's a partnership in caregiving." The app's user-friendly layout is presented, accentuating family interactions and care collaboration. "our free app aids in coordinating care, engage the entire care circle, and lightens the caregiving load."

Concluding, the spokesperson, with a gentle smile, shares, "For the peace of mind you deserve and the care they need, stay connected with Connected Caregiver." The scene fades with the elderly woman video-calling a young family member, both laughing, symbolizing the bond the device fosters between generations.

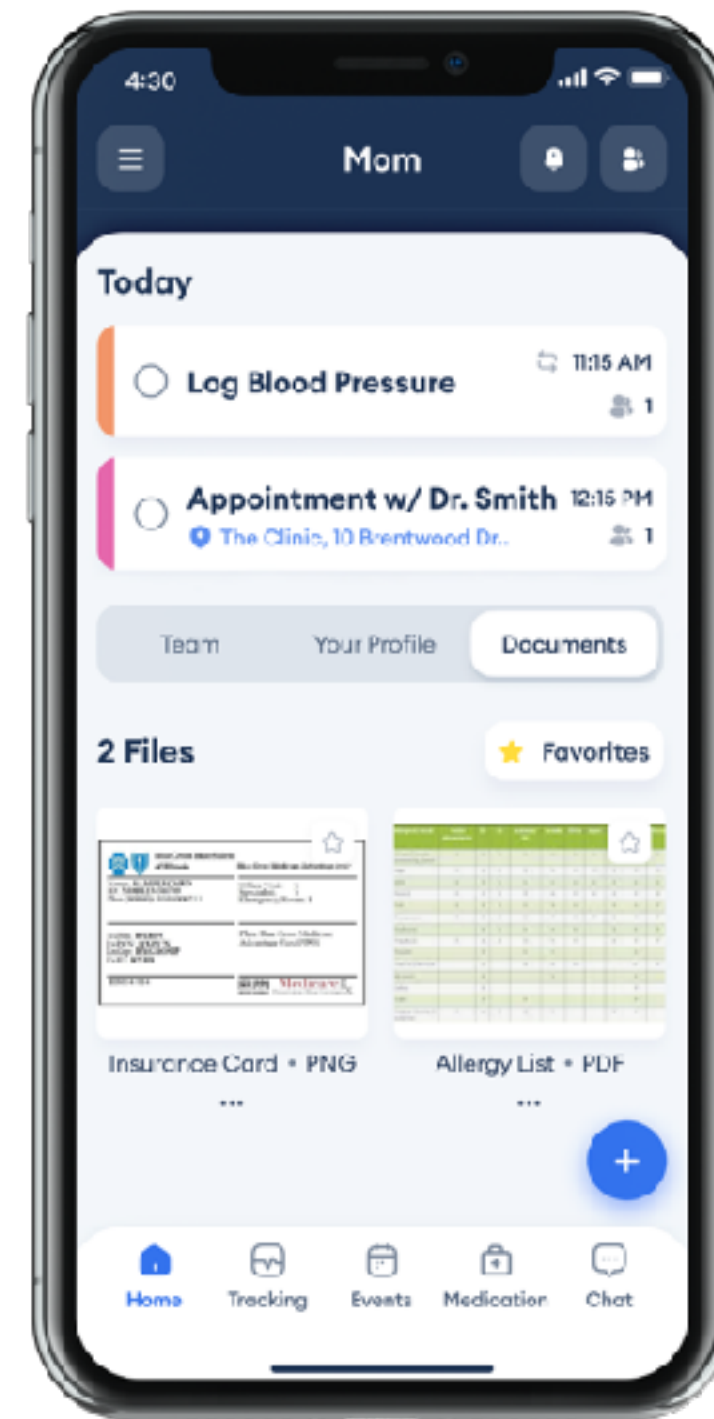
[This commercial is currently in final post production].

ADDITIONAL EXPERIENCE

“Connected Caregiver was just an idea when we began working with 5by5. With them as a strategic partner, we were poised to move from test market to full launch with a well-defined brand, messaging and a plan to reach our target.

Having worked with multiple (some very big and well-known) agencies in my 20+ years in marketing, I can honestly say that 5by5 has easily been the most collaborative partner I’ve ever experienced.”

Jeff Hingher, Chief Marketing Officer



ADDITIONAL EXPERIENCE

The following are very brief overviews of research projects which, according to these customers, made a significant impact on their businesses. The outcomes reported were shared with our team by these clients. Their testimonials confirm their perception of the value the work provided. This is further substantiated by the fact that each year 60% - 70% of 5by5 research projects are conducted with repeat customers.

Awana Year over Year Donor Research – After working in a consulting role for 18 months with the Awana executive team, Mark and the research team conducted a series of donor research projects to provide comprehensive feedback as this \$50+ million ministry transitioned to more of a donor model (from sales revenue model). These projects were:

- Donor Segment Understanding Research (2019) - Quantitative and qualitative to understand the donor base including why they started giving, what is important to them moving forward, how do they see the brand, needed communication, etc.
- Monthly Donor Research (2020) - Both the quantitative and qualitative phases of this project were to understand why some donors choose to give recurring gifts to Awana and why some do not. Essentially, what is the “why” that will help create compelling messaging and an ask that will motivate and mobilize recurring donors? What is the “hook” that will lure donors to give monthly? We also tested the effectiveness of messaging to prospective donors.
- Resilient Donors (2021) - This project was meant to identify a pool of individuals who are open to becoming undesignated giving partners because they believe in Awana’s future direction. The Awana professional donor team can then reach out to the best prospects with a greater understanding of their passions and interests to begin a conversation that leads to an ask. This project included both quantitative and qualitative phases.

Trevecca Nazarene University Brand Perception Research – The University was interested in developing an aggressive growth plan and commissioned research to identify challenges and opportunities. Based on the key findings from research, TNU partnered with 5by5 marketing team members to rebrand and develop a new tagline and messaging. The impact was significant: According to the marketing team TNU broke a 100+ year-old enrollment record because of the new branding and messaging the 5by5 team developed based in-part on the research.

This growth was part of the reason TNU became the fastest growing university in Middle-Tennessee (a market which includes some of the nation’s most highly regarded universities).

“The research allowed Trevecca to rebrand behind the four key pillars that were gleaned through the data. That rebrand was significant in the messaging that led to us breaking a 113-year undergraduate admissions record. I’m very grateful for the team and the insight they provided to Trevecca.”

Matthew Toy, Marketing Director at the time of the project, Trevecca Nazarene University

Tennessee Titans Game Day Experience Research – 5by5 conducted research for five consecutive years to measure season ticket holders’ (the most critical customer) assessment of the gameday experience. Using key metrics and a proven process improvement model, these results were achieved: Overall satisfaction went from just under 30% (net-satisfied) in year one to over 70% as needed improvements were identified and quickly addressed. Likelihood to renew season ticket (another critical metric) was at 44% (net-likelihood to renew) in year one and improved to more than 80% as leadership responded to the problems that were impacting loyalty. Team Ownership went from negative (lowering satisfaction and intended loyalty) in the first year, to an area of strength. The primary owner was named “Tennessean of the year” in part due to initiatives based on the research findings.

“It is critically important to us to understand the dynamics of the relationship between ourselves and our customer. And 5by5 does a fantastic job of helping us see that clearly and understand where we need to go with our customers.”

Stuart Spears, Senior Vice President & Chief Revenue Officer Tennessee Titans

ADDITIONAL EXPERIENCE

Additional projects of note:

OLSS Global Market Definition Research Plan – Working with international partners, the 5by5 research team developed a far-reaching preliminary plan for identifying and quantifying information to support OLSS, the global eyewear leader’s potential expansion and targeting into developing markets.

Williamson Health - 5by5 conducted research to fully understand the brand position of WH and its principal competitors in its primary trade area; 5by5 also designed and executed qualitative research to test and refine branding elements which resulted in its rebrand to Williamson Health.

For **National Seating & Mobility**, a leading provider of mobility and accessibility, 5by5 has conducted satisfaction and brand research with employees, and key customers (B2B and B2C); initial study to benchmark metrics and subsequent waves to track changes over time (process improvement research).

For **Mount Vernon Nazarene University**, 5by5 conducted across-the-board research with multiple audiences to understand MVNU’s brand positioning, especially compared with regional competition and to measure quality and satisfaction of stakeholders’ experience. The project also included market definition - with estimated populations by segment for targeting.

For **Mount Pisgah Academy**, a faith-based boarding school in North Carolina, we crafted a plan to support achieving enrollment goals by surveying multiple audiences including regional leaders and prospects. The focus was on the unique challenge of growing enrollment of both residential and non-boarding students.

For **Brentwood Academy**, 5by5 Research developed and fielded a comprehensive project with multiple audiences - including the community - to fully understand BA’s position against competitors and to measure stakeholders’ satisfaction with their experience. Research team is in conversations currently to repeat the study again to measure progress.

For **Westminster Seminary California**, the 5by5 research team helped provide intelligence to support growth by surveying all key audiences (including alumni and referral sources) and establishing an understanding the dynamics of enrollment decisions, strengths and weaknesses as well as primary reasons for choosing or rejecting WSC.

Bryan College was interested in developing an innovative strategy for growing non-traditional student enrollment. The 5by5 team conducted research in the marketplace among prospects who were considering additional education to measure the attractiveness and determine the feasibility that the offer would be successful.

Research to support **RGP Global Consulting’s RGPU training program** was designed to onboard new employees and help them adapt to RGP culture and particularly to operate effectively in RGP systems and processes.

A project with **Portage Learning** was conducted to better understand perceptions of its multiple online learning brands and programs as well as to confirm some directions for expansion and growth beyond the 25,000+ students it was serving.

4.4 Implementation

4.4 Implementation: (20 Points)

Describe the methods and processes that you would use to complete the tasks and objectives outlined in Section 2 (Scope of Work).

Partnership Overview -

The initial research in Phase 1 will capture ideas about the messaging (as outlined in the objectives). In Phase 2 the foundational creative will be developed. In Phase 3, research will be used to validate the messaging and even some creative (design, video concepts, etc.). From there, all final creative will be developed.

The following is our interpretation of UMMC scope requirements combined with our recommended approach to optimize your desired outcome. Should our approach not directly align with the expectations of the UMMC team, we can amend the scope upon further discussion and understanding of the desired cadence for research and creative execution.

Phase One: Research and Discovery (Winter 2023):

- Immersion and Onboarding
- Primary Market Research

Phase Two: Creative Development, Strategy & Execution (Spring 2024 – Summer 2024):

- Campaign Foundations Brief
- Key Campaign Collateral Development

Phase Three: Deliverables (Summer 2024):

- Campaign Market Testing
- Creative Campaign Execution

The scope of work to follow assumes up to two rounds of revisions per deliverables unless otherwise noted. Research deliverables and the Strategic Communications plan deliverable does not include revisions.

Phase One: Research and Discovery (Winter 2023)

IMMERSION

5by5 begins every partnership by immersing in the business landscape, goals, audiences, distinctives, stakeholders and perspectives of the UMMC team and other key stakeholders. This 4 - 6 week Immersion phase is strategically focused on onboarding, briefing and aligning on the path forward.

We begin this phase with a series of on-site, in-person meetings (typically consolidated into 1 - 2 days). This time ensures our team is able to see your facilities and headquarters first hand, meet with your team face-to-face and is well-positioned to pursue the opportunities that matter most. Ahead of this time, we will review all relevant business and marketing strategy documentation, prior market research, etc. to ensure we are well-read heading into our time together.

For a time, our working assumptions and aspirational ideas will be set aside while we fully immerse ourselves in the perspective of your team. We believe maximum results will only be achieved by the preparatory attainment of accurate historical data and a quality understanding of how our partner views the current landscape.

Following the Immersion process, 5by5 works in a quarterly planning focus that prioritizes early wins without compromising long term goals. This includes:

- An account team consisting of an account strategist and project manager leading every deliverable our team produces.
- Strategic subject matter experts brought in throughout the engagement to provide focused guidance and outputs.
- Strategic planning sessions facilitated by our Account Strategy team for goal setting, allowing UMMC to more fully benefit as a contributor to the goals and subsequent strategies.
- Ongoing client management, strategy, meetings and support, including proactively anticipating needs, providing status reports and ongoing communication.

For more on the overall client experience, please see our response to question 4.2 Company Personnel / pg. 5.

Phase One: Research and Discovery (Winter 2023)

MARKET RESEARCH

Next we move into the primary Market Research and Discovery phase of the project.

Background & Objectives

The initial research phase of the project will be designed to meet the following objectives:

- Overall, to understand the value a comprehensive cancer care center will bring to the people and state of Mississippi - and to validate messaging that will make a compelling case to financially support it.
- Determine baseline understanding of UMMC brand strengths, weaknesses, opportunities and challenges and how these can best be leveraged toward capital campaign efforts.
- Gain perspective from frontline gift officers on the tools and resources required to meet goals.
- Discover and explore “big ideas” and themes that have the greatest potential to resonate with top donors.
- Gain additional insights on donors motivations for giving, UMMC brand perception, aspirations, social influencers, beliefs, behaviors, values, proof points, etc.
- Begin to lay the foundation for the following, which will be created in Phase 2 and 3 of the project:
 - Campaign messaging/branding that best resonates with principal/major gift donors and aligns with UMMC related branding, marketing and/or promotion campaigns directed through the Office of Communications and Marketing
 - Capital campaign message platform that aligns with UMMC/Vice Chancellor communications and development campaigns
 - Target donor segments
 - Best channels/means for communicating with donors/prospects

Methodology - 35 - 40 In-Depth Interviews (IDIs)

To meet the initial research objectives, the 5by5 research team recommends using an in-depth Interview (IDI) methodology. In-depth interviews are conversations, facilitated by a professional researcher using a carefully developed discussion guide. These IDIs will provide deep insight into the issues UMMC really wants to understand - to help meet the research objectives of the project.

The 5by5 team recommends this approach because the targeted audiences will be very difficult to schedule and recruit into focus groups. Also, in these one-on-one conversations audience members are much likely to be candid and honest. The 5by5 interviewing team is experienced at building rapport and making respondents feel safe and comfortable - even to talk about sensitive issues. This approach will be very effective for achieving the desired outcome and meeting the research objectives.

To meet the project objectives, the 5by5 research team recommends conducting 35-40 IDIs. The distribution of these by audience can be determined in the research planning phase.

Phase One: Research and Discovery (Winter 2023)

Audience - UMMC: Internal Stakeholders

The RFP calls for beginning with internal stakeholders who can share their passions and perspectives to support the development of campaign messaging. These stakeholders include:

- Leadership (Assume these are officers, executives, board members, etc.)
- Faculty
- Physicians
- Gift officers
- Top donors and/or campaign volunteers

Assumptions for audience sampling:

The 5by5 team will depend on the UMMC team to help achieve a successful outcome. The following are assumptions about this process:

- All contact information will be available through the UMMC database.
- UMMC will make all initial contacts with potential respondents to communicate the importance and ask for participation.
- The 5by5 research team will follow up with those who show interest to recruit and interview them.
- We assume incentives will not be necessary for inducing participation. In most cases, with internal stakeholders and employees, incentives are not appropriate to encourage participation.

Panel Recommendation

For projects like this, where there is a process - especially a development process - it can be valuable to recruit participants to serve on a research panel. In this case, the idea of a panel is that we recruit participants and ask them if they are willing to participate and give their feedback again later in the process (Phase 3: Market Testing, once the creative is developed).

The panel involves a commitment to give feedback at intervals in the process. One model which the 5by5 team has successfully used is the Design Thinking model. This model begins with agreement around the problem to solve - in this case - *what is the right messaging to motivate people to give to the UMMC CCRI capital campaign?*

Some of those who participate in Phase 1 (IDIs) will be asked to participate again in Phase 3 because they will already understand the objectives - developing messaging and creative that will appeal to and motivate donors. In turn, they can provide feedback and perspective on the execution to answer the question - *"did we get it right?"* Utilizing some of these participants as a part of both Phase 1 and Phase 3 should add more knowledge and insight to the findings.

Phase One: Research and Discovery (Winter 2023)

Our Process

5by5 will kick-off this phase with an initial Planning Session - we will collaborate with your team to build the right tools to inform key decisions and address the objectives. This kick-off process includes a review of the following:

- Goals & Priorities – Confirm what success looks like to ensure our work is guided by your objectives
- Non-Negotiables - Discuss any constraints our work should take into account
- Audience - Discuss the sampling strategy and agree to any undefined parameters
- Next Steps - Address any other coordination efforts and timeline for field work to be successful

IDI Fieldwork:

- 5by5 will write one main discussion guide draft for client feedback to land on a final approved discussion guide. We will create slight iterations of the discussion guide based on the audience segment we are interviewing.
- We will collaborate to specify and agree on the criteria for participation.
- We have a professional interviewer schedule, conduct, video record and produce a written summary of each interview. (Average IDI length is estimated at 20-25 minutes.)
- We assume incentives will not be necessary for inducing participation. In most cases, with internal stakeholders and employees, incentives are not appropriate to encourage participation.

Outcomes & Findings

As a research and strategy company, our passion is to deliver intelligence that addresses the key strategic questions and decisions our clients are facing. This begins with a clear understanding of the key issues and follows through to reporting and analysis.

It ends with providing your team three unique reporting formats to ensure each of the project stakeholders have an ideal structure through which to digest the findings and "so what" factor:

- One-page of key findings
- An Executive Summary (estimated 15-page slide deck to share research high-level objectives and findings to the executive team). The report will provide high-level strategic implications and recommendations based on the research to support business objectives.
- Full details report - This report will include aggregated and integrated findings from selected phases of the research. It will also provide graphics and tables from the quantitative survey results.

Phase Two: Creative Development, Strategy and Execution (Spring 2024 – Summer 2024):

CAMPAIGN FOUNDATIONS BRIEF

Drawing from the research findings in Phase 1, several interviews with your team and our collective knowledge of the space, 5by5 will produce a working model from which to build campaign creative. This Campaign Foundations Brief will document the following:

Donor Definition – The foundational elements of your donor perspective

- Donor Attention
 - Priorities - What are their most foundational desires?
 - Jobs - What are their most actionable tasks?
 - Necessities - What are their most essential expectations?
- Donor Momentum
 - Causes - What may have led them to where they are?
 - Experiences
 - Perceptions
 - Triggers - What could help them move forward with us?
 - Experiences
 - Perceptions
 - Barriers - What could hold them back from joining us?
 - Experiences
 - Perceptions

Campaign Definition – The essence of the story we are inviting donors into

- The Person
 - What do they want?
 - What hope drives the desire for change?
 - What pain drives the desire for change?
- The Problem
 - What foundational problem most clearly defines our purpose?
 - What elements contribute to the foundational problem?
- The Mission
 - What do we do?
 - Why does it matter?
- The Vision
 - What is our goal?
 - What is our plan
- The Challenge
 - What do we need?
 - How can donors help
- The Opportunity
 - What do we want them to do?
 - Why now?
- The Impact
 - What does success look like?
 - What does failure look like?

Internal Narrative – The principle stories that guide us

To solidify your campaign messaging strategy, we capture the distinctive way you see your audience, your work and your impact. These three perspectives should continually serve as meaningful reminders of who you serve, what you do and why it matters – defining the brand of change you seek to make. This is the story we tell ourselves internally to help guide the story we'll share externally. The internal narrative lays out:

- Who We Serve – The hero of our story
- Who We Are – The part we play
- What Is Possible – The work we pursue
- Why It Matters – The reason we exist

The Campaign Foundations Brief will be presented and provided to your team for review and alignment.

Phase Two: Creative Development, Strategy and Execution (Spring 2024 – Summer 2024):

CAMPAIGN FOUNDATIONS CREATIVE DEVELOPMENT

From this document, we produce the following foundational campaign collateral for Market Testing in Phase 3:

Capital Campaign Core Messaging

- Campaign Statement – The most intriguing idea that connects your audience to your vision for the campaign.
- Campaign Introduction – The sentence that causes your audience to lean in and want to learn more.
- Case for Support - The 3-5 page document that represents the UMMC campaign narrative in a single cohesive communication piece. Its copy can be used as the basis of a potential donor letter, as well as a core messaging palette to guide the copy creation of other campaign assets.
- Key Messages – The most important elements of your campaign’s story further described. These could be critical distinctions, technical explanations or additional information on strategy, approaches, and expectations. Most often these messages create value in the secondary sections of brand assets and deeper explanations within donor presentations.

Capital Campaign Visual Expressions

- Mood board - 5by5 will showcase how the UMMC brand will be leveraged to depict a visual look and feel for the campaign.
- Campaign Creative Concepts - 5by5 will present up to two creative concept iterations to include recommended copy headlines and visual art direction to establish the look and story arc of campaign elements for use in campaign implementation.
- Video treatments / scripts and storyboards - 5by5 will develop up to 3 different versions of pre-production video assets that highlight the essence of the campaign, including the campaign focus areas. The format of the treatment will be presented in a storyboard slide deck that walks through the proposed story (a format appropriate for market testing).

Phase Three: Deliverables (Summer 2024):

CAMPAIGN MARKET TESTING

Once the foundational campaign creative is approved by the UMMC team, the 5by5 research team will enter the project again to test the deliverables. Using qualitative research, the team will capture feedback on key messaging concepts and any visual expressions of them (including video concepts) created in Phase 2.

Objectives is to test the overarching capital campaign branding, storytelling strategy, and collateral concepts:

- Do these mean what we think they mean?
- What ideas come to mind when they hear/think of the words/concepts?
- What negatives, blind spots or landmines could be connected with them?
- Do they appeal to them?
- Would these ideas be compelling in messaging to them?

Methodology: 2 Focus Groups and up to 10 In-Depth Interviews to supplement.

5by5 recommended we conduct one focus group with external stakeholders and one focus group with internal stakeholders, in addition to up to 10 IDIs to supplement with targeted individuals whose feedback would be valuable, to be determined in project planning.

- The research team at 5by5 will write one main discussion guide draft for client feedback to land on a final approved discussion guide. We will create slight iterations of the discussion guide based on the audience segment we are interviewing with these ideas in mind:
 - Unprompted feedback on these ideas – just mentioning them with little context
 - Aided questions to elicit feedback – explain what we mean when we use these words and even how they might be incorporated into messaging before more questions
 - Measure the appeal these messages might have with them
 - Ask for their advice in sharing these with other agents and / or their customers successfully
- The research team at 5by5 will work together with the UMMC team to decide the best segmentation for focus groups / interviews.
 - Some participants from phase one will also participate in these focus groups
 - Some selected external stakeholders
 - If more participants are needed, the 5by5 team will conduct additional IDIs to augment needed feedback.
- A professional interviewer will conduct the focus groups and IDIs (if needed). A video recording and written summary of each group (or IDI) will be produced and provided to the client. (Average focus group length is estimated at 90 minutes. Average IDI length is estimated at 20-25 minutes.)

Assumptions:

- UMMC will provide contact information for both the internal and external stakeholders.
- The external stakeholders are individuals with whom UMMC has some connection (so that they are familiar and interested and will not require an incentive to encourage their participation).
- Incentives will not be necessary for inducing participation. In most cases, with internal stakeholders and employees, incentives are not appropriate to encourage participation.

Outcomes and Key Findings

This process ends with providing your team a report to share high-level research objectives and findings with the broader team. The report will provide high-level strategic implications and recommendations to shape the final campaign creative.

Phase Three: Deliverables (Summer 2024):

CREATIVE CAMPAIGN EXECUTION

Coming out of the final testing phase, 5by5 will finalize priority campaign creative strategies and assets for use by the UMMC team. This will include the following:

1. 5by5 will develop an overall campaign, mobile-first responsive website strategy and design, including:

- Overall site map for a site up to 10 pages
- Individual page wireframes for up to 10 pages
- All graphic design, copy and other content for up to 10 pages
- We will deliver files to UMMC. UMMC DIS will build a site within your content management system. The website will be hosted on the UMMC server, but should have its own domain. UMMC will purchase the domain.

2. 5by5 will finalize the campaign creative concept for execution through various print materials. Scope of work includes up to 175 hours of production. This can include, but is not limited to: a case statement, consolidated case statement or executive summary, fact sheets for key campaign goals, and other corresponding print media to be used through the life of the campaign.

3. 5by5 will produce up to 3 final videos. Coming out of market testing, we will shoot, produce and edit up to 3 final videos for use in the initial capital campaign phase.

- Production - Based on script approval, 5by5 will execute an up to a two-day live-action shoot and edit the final production deliverables as scoped to include graphics, voice-over and music bed. Production scope of work includes:
 - Production book and final shot list
 - Day of shoot management
 - Video photography direction
 - Actor direction
- Post-Production - 5by5 will deliver the final edited cuts which includes up to 3 up to :90 long-form videos, and a :15 and :30 second shorter cut of each (up to 6 total videos)
 - Editing - Scope includes up to two rounds of edits to presented cuts
 - Music selection - 5by5 will suggest the music for both. Music fees not included.
 - The final digital file will be delivered to the client for distribution

4. 5by5 will provide a comprehensive, strategic marketing communications plan for promoting the campaign to major donor audience segments leading up to public launch. This will include finalization of major donor audience personas for campaign outreach/messaging as well as:

- Omni-channel communications and marketing plan
- Internal and external stakeholder roll out strategy
- Execution timeline
- Prioritized budget

4.5 References

4.5 References: (15 points)

Provide a list of at least three (3) contracts of a size and scope similar to the work described herein that respondent has performed during the last three years. Include a brief description of the project and services provided, the contract period, the name of contact person(s) directly involved in the project/services along with an e-mail address, phone, and fax numbers.

1. Stephanie Buckley, VP of Marketing

National Seating & Mobility

302 Innovation Drive, Suite 500

Franklin, TN 37067

TELEPHONE # - c. 615.202.9064

E-MAIL ADDRESS: Stephanie.Buckley@nsm-seating.com

GOODS & SERVICES PROVIDED - January 2019 - Present

Comprehensive brand, marketing and advertising strategies and services including, but not limited to, development, design, media buying and deployment of paid and organic campaigns that generate interest in National Seating & Mobility nationwide. This includes:

- Market Research - Quantitative & Qualitative, Secondary Market Analysis
- Campaign Strategy, Creative & Execution (both paid and earned to include search, social, content strategy, SEO, email marketing, mobile marketing) - Assessing, testing, and recommending appropriate campaign position themes and messaging, including art/creative direction, and working with the organization's creative team to design and launch campaigns for these efforts.
- Website Strategy, User Testing, Design & Development, Ongoing Support and Hosting
- Production (full-service) to include video and photography
- Graphic Design Support to include print and digital design
- Dedicated representatives to act as a point of contact and manage the account relationship
- Advertising Plan & Media Placement to include digital/web/internet media platforms
- Ongoing Reporting & Results to include available metrics and reports provided by media outlets
- Proactive client management to include researching, and identifying and executing new marketing opportunities
- Execute media plans to include:
 - Pay-per-click
 - Digital- retargeting
 - Print advertisements
 - Digital advertising
 - Website assets
 - Social media assets
 - Program brochure templates
 - Other marketing deliverables as identified during the normal work process

4.5 References

2. Michele M. Simpson, Director of Marketing and Communications

Williamson Health

4321 Carothers Pkwy

Franklin, TN 37067

TELEPHONE # - 615-435-5356 | office

E-MAIL ADDRESS: msimpson@williamsonhealth.org

GOODS & SERVICES PROVIDED - October 2020 - Present

Comprehensive brand strategy (verbal and visual brand identity and brand roll out), marketing, advertising and public relations strategies and services including, but not limited to, development, design, media buying and deployment of paid and organic campaigns that generate interest in Williamson Health and the Williamson Health Foundation. This includes:

- Market Research - Quantitative & Qualitative, Secondary Market Analysis
- Brand Strategy - Verbal and visual identity and comprehensive brand roll out
- Campaign Strategy, Creative & Execution (both paid and earned to include search, social, content strategy, SEO, email marketing, mobile marketing) - Assessing, testing, and recommending appropriate campaign position themes and messaging, including art/creative direction, and working with the organization's creative team to design and launch campaigns for these efforts.
- Website Strategy, User Testing, Design & Development, Ongoing Support and Hosting
- Production (full-service) to include video and photography
- Graphic Design Support to include print and digital design
- Event Planning - an integral part of the team that has planned and executed large celebratory events including our 2022 Groundbreaking Ceremony for our \$200 million expansion and renovation project and our 2023 Emergency Room Ribbon Cutting
- Dedicated representatives to act as a point of contact and manage the account relationship
- Advertising Plan & Media Placement to include out-of-home, broadcast, print, and digital/web/internet/mobile media platforms, to also include streaming placement (Tubi, HGTV, Food Network, Channel, Netflix, Hulu, YouTube, Spotify, etc.)
- Ongoing Reporting & Results to include available metrics and reports provided by media outlets
- Proactive client management to include researching, and identifying and executing new marketing opportunities
- Execute media plans to include:
 - Pay-per-click
 - Digital - retargeting
 - Billboards
 - Print advertisements
 - TV advertising
 - Digital advertising
 - Website assets
 - Social media assets
 - Program brochure templates
 - Other marketing deliverables as identified during the normal work process

4.5 References

3. Sherry Stinson, SVP of Brand Engagement, Marketing and Public Relations

Habitat for Humanity of Greater Nashville

414 Harding Place, STE 100

Nashville, TN 37211

TELEPHONE # - 615-500-4645 |c|

E-MAIL ADDRESS: sstinson@habitatnashville.org

www.habitatnashville.org

GOODS & SERVICES PROVIDED - July 2022 - Present

Capital Campaign Marketing and Branding Support. This includes:

- Campaign Strategy, Creative & Execution
- Website Strategy, User Testing, Design & Development, Ongoing Support and Hosting
- Video Production
- Graphic Design Support to include print and digital design
- Dedicated representatives to act as a point of contact and manage the account relationship
- Proactive client management to include researching, and identifying and executing new marketing opportunities

4. Jeff Hingher, CMO

Connected Caregiver

10 Cadillac Lane, Suite 350

Brentwood, TN , 37027

TELEPHONE # - 615-939-6007

E-MAIL ADDRESS: jhingher@verustat.com

www.myconnectedcaregiver.com

GOODS & SERVICES PROVIDED - June 2021 - Present

Product Go-To-Market Strategy, Research, Marketing and Launch. This includes:

- Market Research - Quantitative & Qualitative, Secondary Market Analysis
- Brand Strategy - Verbal and visual identity and comprehensive brand roll out
- Campaign Strategy, Creative & Execution (both paid and earned to include search, social, content strategy, SEO, email marketing, mobile marketing) - Assessing, testing, and recommending appropriate campaign position themes and messaging, including art/creative direction

- Website Strategy, User Testing, Design & Development, Ongoing Support and Hosting

- Production (full-service) to include video and photography

- Graphic Design Support to include print and digital design

Dedicated representatives to act as a point of contact and manage the account relationship

- Advertising Plan & Media Placement to include out-of-home, broadcast, print, and digital/web/internet/mobile media platforms, to also include streaming placement

- Ongoing Reporting & Results to include available metrics and reports provided by media outlets

- Proactive client management to include researching, and identifying and executing new marketing opportunities

4.6 Timeline & 4.7 Cost

4.6 Timeline: (10 points)

Provide a performance timeline based on the information presented in Section 2, Scope of Work, that includes all segments of your proposed work.

4.7 Cost: (20 points)

Identify all costs to be charged for performing the tasks necessary to accomplish the objectives of the contract as stated herein. The respondent is to submit a fully detailed budget including estimated staff hours and costs and any non-labor expenses, such as travel and incidentals, necessary to accomplish the tasks and complete the contract. Any contract awarded as a result of this solicitation will be all-cost inclusive; no additional monies will be paid for items excluded from the proposal.

*Travel costs assume 5by5 team flying to UMMC and AirBNB. All hard costs are estimates and are a pass-through which will be invoiced as incurred.

PHASE	Hours	Agency Fee Investment (based on a blended hourly rate of \$198)	Hard Costs* (travel, printing and other est. hard costs)	Timeline
PHASE 1				December 2023 - February 2024
Immersion				December 2023
In-person kick-off meeting [1.5 days]	48	\$9,504	\$1,750 - Travel	December 2023
Immersion Documentation	4	\$792		January 2023
Market Research				December 2023 - February 2024
Questionnaire Development	40	\$7,920		December 2023
Fieldwork	60	\$11,880		January - February 2024
Analysis	40	\$7,920		January - February 2024
Presentation [0.5 day]	16	\$3,168	\$1,750 - Travel	Late February
PHASE 2				March - May 2024
Campaign Foundations				
In-Person Kick-off Meeting [0.5 day]	16	\$3,168	\$1,750 - Travel	Early March
Strategy Brief	30	\$5,940		March 2024
Key Campaign Collateral Development				April - May 2024
Campaign Core Messaging	40	\$7,920		
Campaign Visual Expressions	64	\$12,672		
Collateral Presentation - In-Person Meeting [1 day]	20	\$3,960	\$1,750 - Travel	
PHASE 3				June - October 2024
Campaign Market Testing				June - July 2024
Questionnaire Development	20	\$3,960		June 2024
Fieldwork	40	\$7,920		June - July 2024
Analysis	20	\$3,960		June - July 2024
Reporting / In-Person Meeting [1 day]	32	\$6,336	\$1,750 - Travel	July 2024
Creative Campaign Execution				August - October 2024
Website Strategy & Design	80	\$15,840		Deliverable dates for all outlined collateral will be prioritized based on discussions with the UMMC team. Timeline assumes up to two rounds of revisions per deliverable.
Collateral Development	175	\$34,650	\$20,000 - \$40,000 - Printing costs	
Video Production				
Pre- and Post-Production	240	\$47,520	\$1,500 - est. music and licensing fees	
On-site / In-Person On Location [2 days]	150	\$29,700	\$1,750 - Travel	
Strategic Comm Marketing Plan	75	\$14,850		
Presentation / In-Person Meeting [1 day]	32	\$6,336	\$1,750 - Travel	
TOTAL	1242	\$245,916	TBD	Dec 2023 - Oct 2024

Let's get started

RFP Contact:

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