

Did They Read It?

How to Measure Engagement & Adapt Your Reporting Strategy

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About UCSF

- Healthcare University
 - No undergraduates
 - Five campuses, multiple hospitals
 - Schools of Medicine, Dentistry, Nursing, Pharmacy and a Graduate Research Division
 - #1 grant recipient from the National Institutes of Health
 - Top-ranked Medical Center by *US News and World Report*
 - Joint initiatives with UC Berkeley

Digital Pivot: our Digital-first approach

- Acknowledgment Letters



- Financial Endowment Reports



- Birthdays



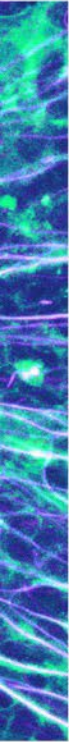
- Holiday Video



- Narrative Impact Reports



Filling the Gap: What we considered



 **Dropbox** DocSend

Help Range

 **Cirrus Insight[®]**

 **ORANGEDOX**

 **Showpad**

 **Paperflite**

Why Paperflite?

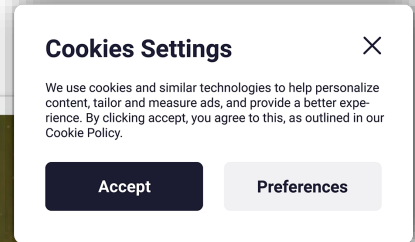
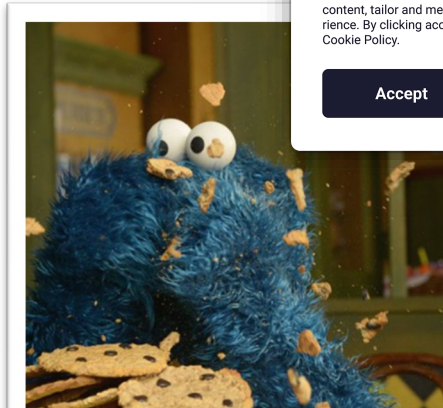
- Customizable domain: we didn't have to use their branding

 <https://seureshare.ucsf.edu/collecti>  

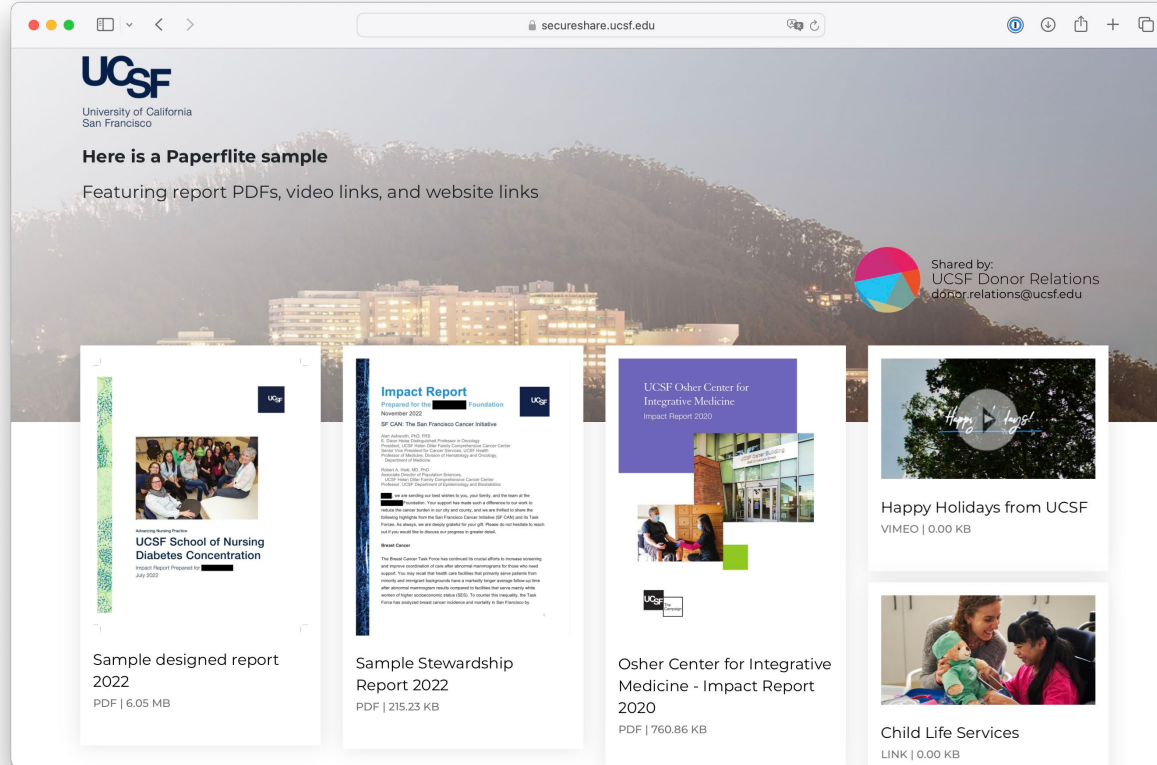
- Ease of use (which accelerates adoption)
- Supports multiple formats (Word, PDF, PowerPoint, videos, web links)
- Send one link for a collection of documents
 - Even if you update content, the link doesn't change
- We can create “anonymous” links for donors who opt out of cookies
- We can create sophisticated collections with multiple tabs

Getting buy-in through donor-centricity

- We built on the momentum from acknowledgments and financial reports
- Faster delivery for our donors: no mailing time
- Email creates a dialogue for our donors to respond and engage
- More secure than attachments
- No file size limits
- Ability to track:
 - Views page-by-page in a deliverable
 - Views by donor
 - Overall time spent reading
 - Shares and downloads



How we're using it



How we're using it



How we're using it

The screenshot displays the Paperflite web application interface. The browser address bar shows 'app.paperflite.com'. The document title is 'Sample Stewardship Report 2022' (215.23 KB | PDF | 5 Pages | Paperflite Cloud). The main content area features a large blue header 'Impact Report' followed by 'Prepared for the [redacted] Foundation' and 'November 2022'. Below this is the title 'SF CAN: The San Francisco Cancer Initiative' and a list of authors: Alan Ashworth, PhD, FRS; E. Dixon Heise Distinguished Professor in Oncology; President, UCSF Helen Diller Family Comprehensive Cancer Center; Senior Vice President for Cancer Services, UCSF Health; Professor of Medicine, Division of Hematology and Oncology, Department of Medicine; and Robert A. Hiatt, MD, PhD. The UCSF logo is visible on the right. A sidebar on the left contains navigation icons. A bottom navigation bar shows 'Page 1 of 5' and navigation controls. A right sidebar provides document statistics: 215.23 KB | PDF | 5 Pages | Paperflite Cloud. It also lists the publisher as 'UCSF Donor Relations' with a last update of '26 Oct 2022'. Below this, a table shows document metrics:

Views	Downloads	Shares	Avg. Time
5	1	10	~52s

At the bottom of the right sidebar, a grid of document thumbnails is shown, each with a page number and average time:

Page #	Avg Time
Page #: 01	00:00
Page #: 02	00:01
Page #: 03	00:01
Page #: 04	04:19
Page #: 05	00:00

How we're using it

The screenshot displays the app.paperflite.com web application. The interface is divided into two main sections: 'conversations' on the left and 'Assets (5)' on the right.

conversations
track user engagement [All viewers](#) ▾

Search by conversation and contacts

Sort by: Created Date | **Last Activity** ▾ | Time Spent

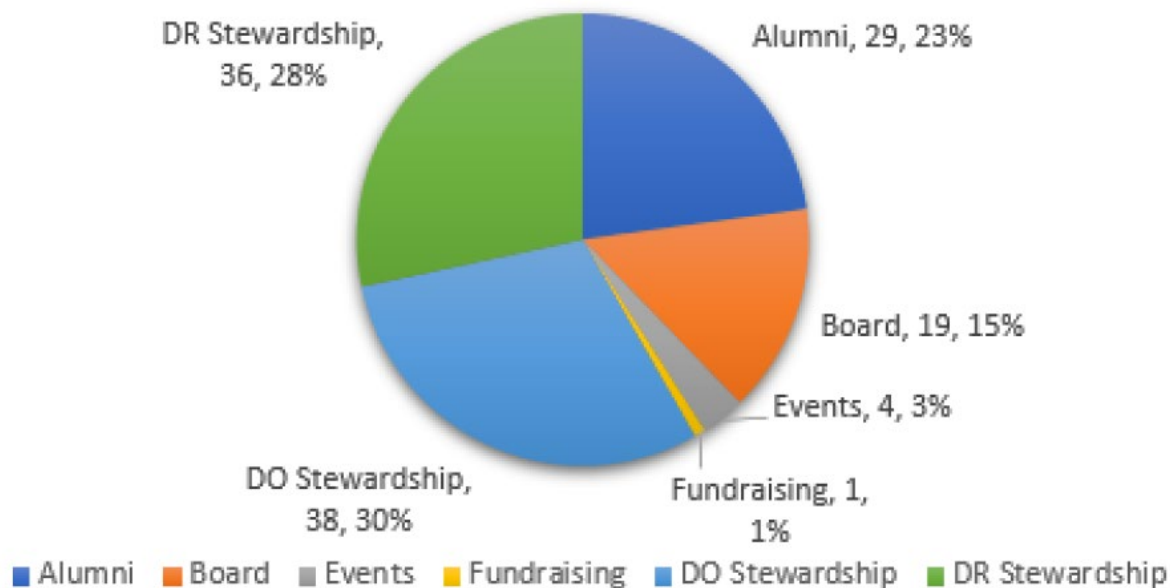
- Last active 2 years ago**
BCH Donor
Simonreidtestem... 0% 100% 01:39
- Last active 3 years ago**
BCH Donor
Simonreid 100% 100% 03:38
- Last active**
BCH Donor
Simon.flynn 0% 0% 00:00
- Last active 2 years ago**
BCH Donor
Testemailmasssen... +2 more 0% 100% 66:18
- Last active 3 years ago**
Testing distribution list functionality
Simon.reid +1 more 100% 50% 07:00
- Last active 3 years ago**
Test template email
Simon.reid 100% 0% 00:00

Assets (5) [VIEW LIVE COLLECTION](#)

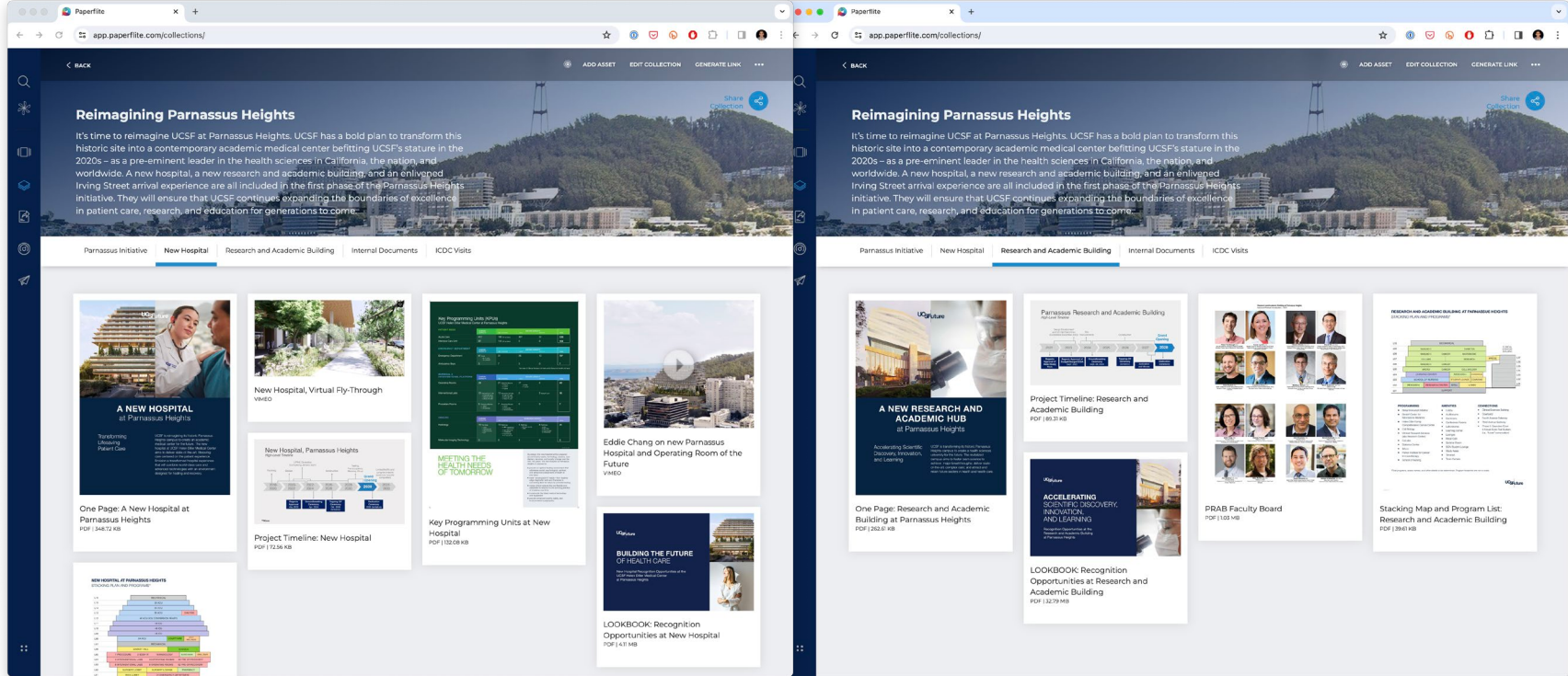
- Sample designed report 2022**
No activity recorded
- Sample Stewardship Report 2022**
No activity recorded
- Osher Center for Integrative Medicine - Im...**
Last Viewed 10 Aug 2021
Page #01
Time Spent: ~1m
- Happy Holidays from UCSF**
No activity recorded
- Child Life Services**
Last Viewed 10 Aug 2021

Who is using it?

FY 23 Paperflite Docs by Use

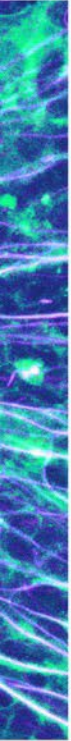


University-wide Use Cases



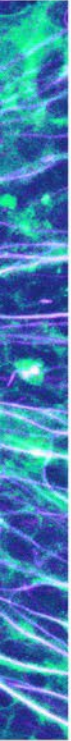
What we've learned

- 1st page almost always has the highest view time
- Donors skip most content to focus on priority topics
 - What matters to them?
- Infographics and bullet points grab their attention
 - Pages with graphics and photos have more page views



How we pivoted to stay donor-centric

- Capture attention up front
 - Tease content in cover emails
 - Maximize 1st page space (cut designed cover page, etc.)
- Help donors access the news they want most quickly
 - Shortcut links in intro or table of contents
 - Keep reports to 1 or 2 pages when possible
 - Summarize main topics/takeaways in bullet points
 - Focus on conclusions about science (less explanation, more clinical implication)



UCSF

UCSF Gastrointestinal Oncology Program

2022 Impact Report

Dear Friends:

I hope this finds you well. My team and I remain incredibly grateful for your support, which has fueled a variety of efforts to improve care for patients with gastrointestinal (GI) cancer and develop more effective treatments. This year's report features our latest news about:

- [Surgical techniques for treating GI cancers](#)
- [Advancements in immunotherapy](#)
- [Precision therapies for liver cancer](#)
- [Care for rare neuroendocrine tumors](#)

In addition, I have been thinking a great deal about the troubling rise in colon cancer among young people. My team is bringing a variety of expertise – from prevention to microbiome science – to the challenge of understanding early-onset colorectal cancer and better identifying and serving these patients. I hope to share more about our progress on this next year.

In the meantime, please know how important your generosity is to our work. With your support, we continue making important discoveries, providing world-class care for our patients, and expanding access to clinical trials with the potential to save lives.

Sincerely,

Alan P. Venook

Alan P. Venook, MD

Madden Family Distinguished Professor of Medical Oncology
and Translational Research

Shorenstein Associate Director for Program Development,
UCSF Helen Diller Family Comprehensive Cancer Center
Professor, UCSF Division of Hematology and Oncology



GI Oncology 2022
Impact Report

537.00 KB | PDF | 7 Pages | Paperkit Cloud

Publisher: Sarah Krumholz
Last update: 26 Oct 2022

VIEW BY: ALL TEAM AUDIENCE

Views Downloads Shares Avg. Time
57 1 18 ~2m



Saved to this PC

Impact Report

Prepared for [Name of Donor]

Month Year

Fund Name

Faculty name, degrees
Professorship Title
Second line of titles
Third line of titles if needed

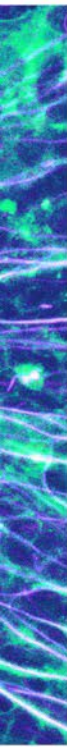
Highlights:

- [Consectetur adipiscing elit](#), sed diam [nonummy nibh euismod](#) [tincidunt ut laoreet](#) dolore magna aliquam [eret volutpat](#). Ut [wisi enim](#) [ad minim veniam](#).
- Quis [nostrud exerci tation allamcorper](#) [suscipit lobortis](#) [nial ut aliquip](#) [ex ea commodo consequat](#). Duis autem vel [eum in iure dolot](#) in [hendrerit](#).
- [Vulputate velit esse molestie consequat](#), vel illum dolore eu feugiat [nulla facilisi](#), at [vero](#) eros et [accumsan](#) et [justo odio dignissim](#) qui [blandit praesent luptatum zzril delenit](#) [augue dui](#).

Use Style: Small Head

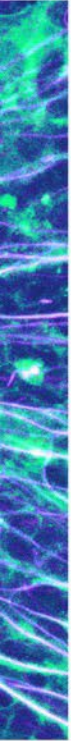
Main body: Ut [wisi enim](#) [ad minim veniam](#), [quis nostrud exerci tation allam](#) [corper suscipit lobortis](#) [nial ut aliquip](#) [ex ea commodo consequat](#). Duis autem vel [eum](#) [in iure dolot](#) in [hendrerit](#) in [vulputate velit esse molestie consequat](#), vel illum [dolore eu feugiat nulla facilisi](#), at [vero](#) eros et [accumsan](#) et [justo odio dignissim](#) qui [blandit praesent luptatum zzril delenit](#) [augue dui](#) [dolorete feugiat nulla](#) [facilisi](#) dolor.

Next steps: Salesforce integration use cases

- 
- Sending naming opportunity proposals and materials
 - Fundraisers and analysts sending proposals, case statements, and stewardship reports
 - Alumni Relations and Volunteer Programs sending meeting materials
 - Post-event follow-up (videos, documents, etc.)
 - Potential data for prospect development team re: engagement scores
 - Integration with Salesforce will create a more database-centric hub for third-party tools

Questions?

- You can reach us at:
 - Alissa Stallings, alissa.stallings@ucsf.edu
 - Vinney Lê, vinney.le@ucsf.edu



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