



Randy L. Brown, Business Administrator
131 West Nittany Avenue
State College, PA 16801
814-231-1021
rlb21@scasd.org

To: Board of Directors

From: Robert O'Donnell
Randy L. Brown

RE: Fundraising Proposal for Fraser Street Sidewalk

Date: September 11, 2013

As discussed at the September 9, 2013 board meeting, the administration has engaged in conversation with Affinity Connection regarding a proposal for a fundraising campaign for the sale of bricks for the sidewalk on Fraser Street at Memorial Field. A draft of the proposal for the services to be provided by Mr. Greg Woodman with Affinity Connection has been provided.

Services included:

- Strategy development
- Theme creation
- Solicitation Mailing
- Advertising writing and design
- eNewsletter and communication coordination
- Database and donation processing

Conversations with Mr. Woodman included use of various district databases as well as possible advertising and communication through district and community avenues. Once Affinity Connection is contracted, the administration will update and seek approval from the board for appropriate steps in the campaign.

Members of the CAC-Finance have assisted the administration and Mr. Woodman in developing this proposal. This group has reviewed the proposal adding their comments during the review process. CAC-Finance members will continue to be used as an advisory group for this project.

The administration has reached out to the State College Borough for approval of the walkway since this project falls under the sign ordinance. We will pursue zoning approval and will update the board as the request moves through the process.

Administration will provide a final version of the proposal at the September 23, 2013 meeting for approval.

The district solicitor, Dr. Etter, was asked to review the proposal in relation to board policies for private fundraising and acceptance of gifts to the district. Following his review, Dr. Etter found the proposal to be acceptable for the district, especially taking into consideration these specific policies.

The sidewalk campaign proposal is separate from the development and fundraising proposal the administration and members of our CAC-Finance are discussing. That proposal will be presented to the board following further discussion with these groups.



State College Area School District

Memorial Field Brick Fundraising Program Contract

Prepared September 12, 2013



Affinity Connection • 2160 Sandy Drive, Ste. D • State College, PA • 16803 • (814) 237-0481
www.affinityconnection.com

Table of Contents

Overview of Request

Goals

Description of Services

Investment/Approval

Affinity Terms and Policies

Overview of Request

A new brick sidewalk is being installed outside Memorial Field. The bricks are 4 inches by 7 and 5/8 inches in size. There is space for more than 8,000 bricks.

The School District is seeking a firm to handle the marketing of the brick campaign to all stakeholder groups: to oversee the marketing and sales of approximately 5,000 to 8000 bricks to alumni, parents, students, grandparents and businesses and interested parties, so they can in “make a mark for life” by buying an engraved brick for the new walkway, as a way to show support for Memorial Field and for the State College Area High School.

Goals

The goal is to raise from \$500,000 to \$2 million through the four month campaign. Secondary goals include cultivating relationships with stakeholder groups, including local alumni, families and businesses, as well as out of town alumni; and building a foundation and creating a “culture of giving” for a long-term clean donor base with a core group of stakeholders who participate in the brick campaign.

Description of Services

Brick Program Solicitation Mailing and Theme Creation and Strategy

- Professionally written solicitation letter segmented to select prospects such as:
 - Lifetime donors of the State High Alum Association
 - 5,000-10,000 alumni prospects (i.e. reunion years, current and past alumni association members)
 - Current families
 - Local businesses
- Payment form designed for brick inscriptions and payment options
- Customized with photo, giving levels, and additional information
- Populated member response form with individual member’s bio and contact information
- Includes #10 mailing envelop and # 9 window return envelope design

Initiation Date: TBD

Completion Date: TBD

Total Cost: Copy writing, design, form creations and project management fee of the appeal \$2000 and you can print and mail using your print shop.

A series of print ads (some could be donated by local professionals)

Professionally written and designed ads promoting the Brick Program with calls to action

Cost: \$750 for writing and design per ad, plus CDT cost

ENewsletter and communication coordination with School District staff

Audience: All Active Stakeholders with email addresses

- Content development and management services include:
 - Identify communications goals through Q&A
 - Ensure that content supports solicitation efforts by:
 - Showcasing how donations are used
 - Profiling donors and volunteers
 - Acknowledging current donors
 - Encouraging contact information updates
 - Complete creative brief, including article priority list, key points of each article, word counts, photograph list
 - Secure, develop and copyedit all content
 - Secure all accompanying photographs
 - Layout in newsletter template and proofing
 -

Total Cost: Included with solicitation mailing.

To make the collection of donations and processing easy and accurate data collection turnkey for the School District, we are suggesting to use Affinity Connection's infrastructure of our data base and donation processing process and data base systems.

Database and Donation Processing

- Hosting and ongoing management of all of your current alumni and donor records, including address and bio corrections submitted via response mail by alumni members
- Merchant account set-up for credit card processing
- Toll-free 24/7 donations hotline set-up
- Donation tracking and processing of all gifts via mail and donations hotline
- Weekly electronic fund transfer of all gifts directly to school district bank account
- Donation reports distributed to alumni leadership weekly and monthly

- 2 Standard reports per month chosen from the following:
 - Full Database (All Statuses and all contact info)
 - Client or Member Contacts Report
 - Donors (Up to 5 years)
 - Gift Listing (Up to 5 years)
 - Current Year Honor Roll
 - Multi-Year Trend Analysis
- Extensive reporting available for additional fees.
- Database Updates submitted in proper excel spreadsheet format. (Updates not submitted in proper format will be made at a rate of \$50 an hour, with a minimum of \$25)

Affinity Connection contracts directly with premier, secure third party providers for donation processing and database management. We do not maintain control or custody of your funds but through a third party provider, direct your donations directly to your bank account. Your organization has control and approval of all content and volume of projects.

Agilis... *A national lockbox/caging and fulfillment company specializing in serving non-profits and associations*

DonorPerfect... *Results-oriented, secure fundraising software for non-profits*

Our partnership with these vendors, allows small to mid-size organizations to enjoy:

- *Fast and secure processing and reporting of online and offline donations*
- *Ongoing updates for contact information and opportunities to segment marketing messages*
- *Comprehensive reports on historical giving and giving trends*
- *Affordable rates through economies of scale*

Total Cost: \$500-750 per month (subject to change based on actual donations per month, this is an estimated cost)...estimated time of brick campaign would be 4 months. We can fine tune the projected cost tied to number of bricks sold.

Website Services (to set up and utilize you're a Memorial Field brick branded website to promote the Campaign that will allow on line donations, forms to download to mail in and promotional content and FAQ on the brick campaign.) Our IModule technology allows for the community to engage and become part of the Memorial Field story.

Create a secure, password-protected online community with fresh, member-focused content, and capabilities that allow members to:

- Update their contact and bio information
- Upload photos and share personal news updates
- Find friends through a private, password-protected searchable directory
- Make a secure donation
- Register for an event, pay event registration fees, and sign up for multiple activities related to an event (*\$100 per event*)

Content management services are included in the monthly fee:

- Weekly updates to the Annual Fund Honor Roll of Donors
- Monthly updates to main home page sections with alumni association and chapter information
- Packaging and posting member-generated content as it is secured by our content team

Monthly email marketing to members included in monthly fee:

- Personalized to each member
- Drives members back to site
- Promotes upcoming events
- Features and generates member content, such as photos and alumni news

Administrator tools available to volunteers

- Upload content
- Update member information
- Generate reports
- Send email marketing to members (*\$75 per eBlast*)

Total Cost: \$235 per month and be active for 4 months or longer.

Investment/Approval

Brick Program Solicitation Mailing

copywriting, design, form creations and project management of the appeal

Cost

(printing and mail service
\$2,000 not included)

Centre Daily Times ads

professionally written and designed ad promoting the Brick Program with calls to action

\$750 (cost per ad)

(Centre Daily Times cost not included - will be a pass through cost to the School District)

Enewsletter and Communication Coordination

eNewsletter to all active stakeholders with email addresses - includes content development/management

(included in the cost of
\$0 the solicitation mailing)

Donation Processing and Database Storage/Maintenance

\$500 - \$750 per month estimated

(dependent on number of items processed & number of records stored)

Website Services

set up of branded website to promote the campaign to allow online donations, forms to download & mail in and promotional content

per month (active 4
\$235 months or longer)

Affinity can pursue use of your current merchant account for processing credit cards by mail and/or online or offer services to connect you with a processing provider

Monthly payments are only available with ACH direct withdrawal or Credit Card payment terms.
Pre-payment accounts must be paid in full before contract is valid.

The authorized signatories below, on behalf of their respective organizations, agree to the pricing and other terms outlined herein and accept the timeline and process for deliverables. State College Area School District has the right to cancel the contract without cost, penalty or liability during the 10 days following the date which this contract is executed. Either party may choose not to renew the contract or terminate the contract with 30 days' notice.

State College Area School District

SIGNATURE _____

DATE _____

(Authorized Official)

SIGNATURE _____

DATE _____

(Authorized Official)

Affinity Connection, Inc.

SIGNATURE _____

DATE _____

The following items are pass-through costs, which may be billed on a quarterly where applicable:

- *Post office expenses for returned mail: \$0.60-0.97 (pass through cost)*
- *Visa/MasterCard processing (if you want this): Applicable charges for set-up and all fees will be billed directly to SCASD by the payment gateway.*
- *Telephone contributions (if applicable): \$3 per call + Visa/MasterCard fees*
- *Donor acknowledgements: \$3 per letter or \$1 per postcard (plus postage with no markup)*
- *Postal Fees, including box rental & bulk permit fee: \$100 (Annually)*

AFFINITY TERMS AND POLICIES

DISCOUNTS: A 5% discount will be given on all program fees prepaid in full in advance.

PAYMENT OPTIONS: Invoices can be paid by ACH, credit card or check. ACH and credit cards are the preferred method of payment.

PAYMENT: All web and data fees are due upon receipt. All other invoicing is due NET 10.

ADVANCE DEPOSITS: Advance deposits are due on all projects. ACH and credit card clients will be invoiced 30 days in advance at 25% of the project cost. Clients who prefer to pay by check will be invoiced the full project cost 60 days in advance.

CANCELLATION: A cancellation fee of \$75 plus incurred costs will be assessed on all cancelled projects.

POSTAL FEES: All postal fees, including but not limited to business reply mail, returned mail and postage due, are passed through to the client and billed on a monthly basis. In some cases, postage costs for a project may be required prior to shipping.

POSTAL METHODS: All projects will be mailed by default presorted standard mail unless specified by the client.

ANNUAL POSTAL FEE: Affinity will invoice all clients using our mailing services an invoice in January for \$100 to cover the costs incurred by Affinity for the cost of post office box rentals locally and at the donation processing center, bulk mail permits, business reply mail permits and postage due accounts.

CREDIT CARD GATEWAYS: Affinity can help you set up a payment gateway to process credit cards via mail and/or internet. Affinity charges set up fees for PayPal and Intuit Virtual terminals. All other charges for processing credit cards are billed directly from the gateway to the client. Affinity can also assist in setting up a merchant account to process credit cards through US Bank. All charges relating to US Bank accounts are charged directly to the client.

DONATION LINE: Affinity has a dedicated phone line to accept credit card donations for clients who are not a non-profit entity. Donations taken over this phone line are assessed a charge invoiced to the client at \$3 plus the current credit card interchange rate and are invoiced monthly.

SALES TAX: Affinity is required to charge all clients Pennsylvania Sales Tax on all mailings going to Pennsylvania residents. If you are tax exempt in the state of Pennsylvania you are required to submit a tax exempt form to Affinity to avoid being charged Pennsylvania sales tax.

DATA CONFIDENTIALITY: Affinity Connection maintains that client member information shall remain the property of the client and will not be utilized or disclosed to any person or entity without the permission of the client. Affinity will not disclose, rent, lease or sell any client information in any form for any purpose.