

June 29, 2022

**BOSWELL PROPOSAL TO THE ASSOCIATION FOR THE STUDY OF AFRICAN AMERICAN
LIFE AND HISTORY (ASALH)
FOR FUNDRAISING PROJECTS FOR
THE ANNUAL CONFERENCE**

Boswell Communications, LLC (“Boswell”) is honored to provide you this proposal for the Association for the Study of African American Life and History (“ASALH”) 107th Annual Meeting and Conference in Montgomery, Alabama.

Boswell, the Washington, D.C. based boutique fundraising and public affairs firm, was founded by a seasoned political and fundraising professional with experience at the executive, legislative and municipal branches of government. Our principals and associated professionals include experts in fundraising as well as political and crisis communications - utilizing both quantitative and qualitative data about your organization to develop your fundraising campaign and to develop a compelling case for support.

We incorporate risk analysis, regional and national market research, strategic planning and assess the current organizational fundraising goals and financial capacity (including commitments) within the organizational database and analyze the philanthropic landscape. We develop a tailored fundraising program including an investable case for support of the client project and the development of a campaign message.

We are multi-disciplinary, working around the country on behalf of our clients. We support our client's goals by utilizing our expertise and broad contacts across multiple platforms to effectuate the client's desired outcome and best interests.

I. The Boswell Team

The Boswell team consists of individuals who are disciplined, intelligent, deeply experienced professionals.

Erika L. Van Croft is the Founder and President of Boswell. Mrs. Van Croft possesses unique expertise in the areas of fundraising and communications, as well as governmental affairs, disaster relief and energy policy.

She began fundraising as a child, assisting her grandmother in multiple fundraising efforts. She has fundraised professionally for the Democratic National Committee in Washington, D.C., the President and Vice President of the United States, presidential candidates, U.S. Senate candidates, members of congress, municipal candidates and non-profit organizations.

Her government service includes serving as a Communications Director in the U.S. House of Representatives for a member of the Homeland Security Committee; and as Press Secretary at the Department of Homeland Security-FEMA, where she articulated the government's recovery policy on-site within regions affected by natural disasters.

Her municipal government service has included serving as Special Assistant to the Mayor of Philadelphia, PA where she worked on a multiplicity of issues related to labor, public

policy, and elections. She has also participated in discussions, negotiations and MOU signings at the head of state, head of government, cabinet level while serving at the U. S. Department of Energy.

Earlier, she served in the White House press office and in the Office of the First Lady; and has consulted on seven (7) nationwide presidential campaigns in Communications, Political Analysis and Advising, Events Management and Fundraising. She also served as the Confidential Assistant to the Deputy Undersecretary for Policy and Planning at the U.S. Department of Agriculture.

Boswell utilizes various platforms to assist in executing fundraising efforts - including NPG-VAN (popularly known as “the Van”). Mrs. Van Croft’s cousin Howard Moseley, Jr. is the original developer of the VAN - the fundraising and field operational technology currently licensed as NGP-VAN and popularized by the presidential campaign of Barack Obama.

Boswell will work in consultation with other professionals as needed for this project.

II. Work Product

A. Background and Assessment

The 2022 ASALH Annual Meeting and Virtual Conference is currently scheduled to be held from September 29 - October 1, 2022 in Montgomery, Alabama. This year’s conference theme is “*Black Health and Wellness*” and will provide members and supporters a unique opportunity to gather in either an in-person or virtual setting. Currently, Executive Director Sylvia Cyrus has established a \$150,000.00 fundraising goal in support of the conference.

While there are currently an estimated \$70,000.00 in commitments from proposed funders for the conference, and the conference has been supported in previous years by major corporations - including AARP and Farmers Insurance - we are keenly aware of the fundraising requirements that must be met in order for the ASALH to reach its financial goal. Our multi-platform fundraising campaign will capitalize on ASALH's excellent history and leadership in the educational, historical and non-profit space, and will seek to expand its support throughout the region and nation.

A review of ASALH's financial needs and background, which was shared with Mrs. Van Croft during the meeting with Executive Director Sylvia Cyrus and President Dr. W. Marvin Dulaney, shows multiple opportunities for engagement with communities in the corporate sector. These communities have articulated a profound interest in supporting organizations such as ASALH, whose mission aligns with the current climate of investing in non-profit organizations and social justice organizations such as ASALH via Environmental, Social and Corporate (ESG) governance - an approach to evaluating the extent to which a corporation works on behalf of social goals.

In order to garner financial support for the annual conference and beyond, ASALH must fully engage these communities in a meaningful way that resonates with these audiences. This can only be done with a keen understanding of the fundraising landscape and by leveraging existing close relationships and developing new relationships with these audiences. In our view, there is a significant opening for ASALH which can be enhanced by a skillfully planned and executed fundraising campaign. This would, in our view, also secure long term financial support for ASALH's February Black History Month Festival and other endeavors.

Our assessment is that this program's likelihood of success will be maximized if

implemented immediately. We strongly discourage waiting to begin implementation only thirty (30) days from the date of the conference.

Boswell's expansive reach will engage funders in multiple sectors, including the corporate sector. This will include those funders who have been dormant or require re-engagement.

Upon engagement, Boswell would perform the following:

- Complexity analysis
- Develop a segmentation strategy, incorporating engagement metrics
- Analyze and articulate the social value of supporting the annual conference

B. Fundraising

1. Objective

Boswell will serve as the primary fundraiser in support of the 107th annual conference.

A delineation of the services in support of the objective follows.

2. Strategy

Boswell's fundraising strategy will align with the overall goals of the organization to reach targeted audiences. Boswell will develop a multi-step fundraising program, which incorporates a "Planning Phase" and culminates in the campaign's execution phase.

The key elements of the fundraising strategy Boswell will develop include the "ask" (requesting an amount of support from the targeted funder) timing, delivery and deep audience knowledge. We will reach communities who have articulated an interest in supporting

educationally and historically based non-profits as well as those who have no previous relationship with ASALH. The mechanism by which our plan will reengage past funders and engage new funders has its genesis in our long-term relationships and understanding of these critical bases.

C. Scope of Work

Overall, Boswell would:

- (1) Utilize our vast relationships while concurrently developing and building additional influencer relationships to amplify the conference targeting funders within key demographics;
- (2) Target new audiences by leveraging partnerships with influencers to grow the funding base specifically for ASALH;
- (3) Set and use specific timelines and benchmarks to keep the fundraising campaign on track.

a. Specific Services

In support of ASALH's 107th annual conference, Boswell proposes to provide the following services:

- Data Analysis - a dive deep into ASALH's database to develop your ideal prospect pool, helping you to determine potential major gift donors, gift capacities, and target ask amounts
- Donor Relations - strategic discussions with key stakeholders and survey of a broad pool of supporters to discover:
 - Constituent perceptions of ASALH's development efforts

- Reveal opportunities and obstacles to philanthropic growth
- Examination of the philanthropic landscape, providing a competitive analysis of other nonprofits in your region (Washington, D.C. - where ASALH has its headquarters)
- Prospect cultivation
- Campaign Planning
 - Identify where ASALH is to date (including requests for funding, initial contacts, declinations, ect.)
 - Develop a “Case for Support”
 - Conduct a database and wealth screening and wealth match
 - Provide data analysis
 - Prospect pool development - create a tiered list of your best prospects

Following this assessment, Boswell will develop the campaign plan specifically tailored to maximize ASALH’s fundraising opportunities in support of the conference.

- Reports

Boswell will produce the following reports:

- Interim report of progress and emerging themes
- Comprehensive and actionable final report

Additionally, Boswell will provide:

- Strategic counsel on all related campaign topics
- Develop cultivation and solicitation strategies during the “Planning Study”
- Explore and reaffirm fundraising potential within ASALH

- Produce an E-survey for appropriate constituents following the conference
- Assess Internal Readiness - identify staff and volunteer resources to achieve your goals

D. Additional Assistance

In addition to the above stated capacities, Boswell is prepared to assist with the Black History Month Festival in February 2023 in the following areas:

- Growing and energize your donor base
- Campaign Audit - Analyzing and assessing the previous year's festival
- Strengthen engagement models
- Advancing the ASALH mission
- Identifying key takeaways - key factors in successes and opportunities
- Stakeholder maintenance - keeping donors and volunteers engaged
- Assessing how people, systems and operations at ASALH are integrated and work together

Boswell will maintain the campaign infrastructure including goal and metric development, campaign reporting, staffing structures. We establish consensus on campaign objectives and vision, which allows us to further develop a compelling and investable case for support. Because the engagement of your leaders and community is paramount, Boswell works with your leadership, staff, and board to develop the most effective solicitation strategies.

Without reviewing the totality of the fundraising plan, it is difficult to provide a more specific program. Boswell tailors each of our engagement strategies to our clients and their goals.

E. Terms of Engagement

At this point, Boswell will provide the following cost estimate, which may be found below. We would be happy to provide additional estimated costs once we get the details for additional requests for the scope of work, including any additional services we would be engaged to deliver.

Below are the proposed costs for this project:

Description	Quantity	Price	Time	Total
Staffing	1	10,000.00/mo	July-Nov	\$40,000.00
Tax				6%
Total				\$42,400.00

Any additional personnel shall be subcontracted through the contractor in consultation with ASALH.

Event(s)

Any events related to fundraising shall be developed in consultation with the designated client representative. The management and planning of any fundraising events will be the financial responsibility of ASALH.

F. Disclosure

As a professional matter, Boswell does not provide contact information, digital, cellular or otherwise, for funders, performers, entertainers or individuals in leadership (or associated) positions which would enhance the likelihood of support for ASALH.

We are willing to leverage our extensive knowledge and relationships as appropriate in support of ASALH's conference.

G. Timing

We are prepared to begin work immediately and move as quickly as possible to begin organizing in support of the fundraising campaign and ASALH's conference.

We thank you again for your consideration and the opportunity to work with you in support of ASALH's fundraising campaign and 107th Annual Meeting and Conference.

Boswell Communications, LLC