



ASSOCIATION FOR THE STUDY OF AFRICAN AMERICAN LIFE AND HISTORY, INC.[®]

301 RHODE ISLAND AVE., NW SUITE 2204, WASHINGTON, DC 20001
P 202.238.5910 | W www.asalh.org

July 6, 2022

Ms. Erika Van Croft
Boswell Communications, LLC
614 S.4th Street
Suite 171
Philadelphia, PA 19147

Re: Consultant to ASALH

Dear Erika,

This letter agreement (this “*Agreement*”) sets forth the understanding and agreement as to the terms under which you (“*Consultant*”) will provide services to the Association for the Study of African American Life and History (“*ASALH*” or the “*Association*”) as a Consultant to the Association. The parties intend this Agreement to be binding and enforceable, and that it will inure to the benefit of the parties and their respective successors and assigns.

1. Engagement.

1.1 Scope of Services. Consultant agrees to provide services to the Association as described in **Exhibit A** hereto (collectively, the “*Services*”) during the term of this Agreement. Consultant shall perform the Services in accordance with the terms and conditions of this Agreement and **Exhibit A**. Consultant will report to Sylvia Cyrus, Executive Director, or a designee.

1.2 Professional Standards. The manner and means used by Consultant to perform the Services desired by the Association are in the sole discretion and control of Consultant. The Services, and the results thereof, will be performed with and be the product of the highest degree of professional skill and expertise.

2. Compensation. As sole compensation for the performance of the Services, Consultant shall receive the consideration specified on **Exhibit B** hereto.

3. Independent Contractor Status. Consultant is an independent contractor, and nothing in this Agreement is intended, or should be construed, to create a partnership, agency, joint venture, or employment relationship. Consultant will not be entitled to any bonus compensation or retirement benefits that ASALH may make available to its employees. Consultant is not the agent of ASALH and is not authorized to make any representation,

contract, or commitment on behalf of ASALH. ASALH will not make deductions from amounts payable to Consultant hereunder for taxes or insurance. All payroll and employment taxes shall be the sole responsibility of Consultant.

4. Confidential Information. Consultant agrees to hold ASALH's Confidential Information in strict confidence and not to disclose such Confidential Information to any third parties. Consultant also agrees not to use any of ASALH's Confidential Information in any manner or for any purpose not expressly set forth in this Agreement and will not disclose any such Confidential Information to any third party without first obtaining ASALH's express written consent on a case-by-case basis except as provided for herein. For purposes of this Agreement, "**Confidential Information**" includes, but is not limited to, confidential and proprietary information regarding ASALH's operations, programs, activities, strategies, members, trade secrets, and any other confidential, proprietary, privileged, or secret information of ASALH and its members which is either designated by ASALH as confidential or otherwise by the nature of the circumstances surrounding the disclosure, Consultant should reasonably know is proprietary or confidential.

5. Ownership of Work Product. While providing the Services, Consultant may produce various reports, databases, computer programs, maps, drawings, plans and similar materials (referred to hereafter as "**Work Product**"). Consultant acknowledges and agrees that all such Work Product and all related copyrights or trademarks that may arise while providing the Services shall be vested in ASALH and, at the expiration or prior termination of the Term, Consultant agrees to turn over and deliver to ASALH all such Work Product in Consultant's possession (including copies or reproductions and excerpts) and relinquish all claims to such intellectual property rights in favor of ASALH. Notwithstanding the foregoing, all work, documents, items, and products that (a) Consultant intends to use in performing the Services under this Agreement, (b) is either owned solely by Consultant or licensed to Consultant with a right to sublicense and (c) is in existence in the form of a writing or working prototype prior to the date of this Agreement shall be owned by Consultant and shall not be deemed Work Product for purposes of this Agreement. The Consultant must demonstrate that she has given a good-faith effort to meet the services described in **Exhibit A**. To the extent possible, all records created in producing the Work Product shall be stored on ASALH's network.

6. Representations, Warranties and Covenants. Consultant agrees during the term of this Agreement not to accept work or enter a contract or accept an obligation, inconsistent or incompatible with Consultant's obligations under this Agreement or the scope of services rendered for the Association. Notwithstanding the foregoing, it is understood that (i) should Consultant be offered a full-time employment position, she is free to consider accepting it and to exercise her termination rights as set forth below and (ii) subject to Consultant's obligations under this Section 6, Consultant shall be free to accept consulting assignments from third parties. Consultant further agrees not to disclose to the Association, or bring onto the Association's premises, or induce the Association to use any confidential information that belongs to anyone other than the Association or Consultant. Consultant represents and warrants that: (a) Consultant has the full right and authority to enter into this Agreement and perform her obligations hereunder as of the Effective Date, (b) Consultant is under no duty, pursuant to an agreement or otherwise, that

is inconsistent with Consultant's obligations under this Agreement as of the effective date hereof, and (c) all work performed by Consultant under this Agreement complies with or will comply with all applicable United States laws and regulations.

7. Indemnification.

(a) Consultant agrees to indemnify, defend and hold harmless ASALH, its affiliates and their officers, directors, employees, agents and representatives, from and against any and all third-party claims, demands, losses, damages, liabilities, costs and expenses (including reasonable attorneys' fees) arising from or alleged to arise from (i) Consultant's breach of any of its obligations, covenants, representations or warranties under this Agreement, (ii) any act or omission of Consultant which constitutes fraud, willful misconduct or reckless conduct; (iii) any violation of United States law by Consultant.

(b) ASALH agrees to indemnify, defend and hold harmless Consultant from and against any and all third-party claims, demands, losses, damages, liabilities, costs and expenses (including reasonable attorneys' fees) arising from or alleged to arise from (i) ASALH's breach of any of its obligations, covenants, representations or warranties under this Agreement, (ii) any act or omission of ASALH which constitutes fraud, gross negligence or reckless conduct; or (iii) any violation of United States law by ASALH.

(c) Neither Consultant nor ASALH shall be liable to the other hereunder for any consequential, indirect, punitive, or exemplary damages, or for any special damages, including but not limited to loss of profits, loss of sales or lost opportunity, whether a party has been apprised by the other of the possibility such damages might be incurred.

8. Term; Termination. The term of this Agreement shall begin as of **July 1, 2022** (the "**Effective Date**") and shall expire on **October 31, 2022**. Thereafter, the parties may renew this Agreement for successive monthly periods as mutually agreed. The previous term, the period from the "Effective Date", and any renewal terms shall be the "**Term**" of this Agreement. Notwithstanding the foregoing, (i) each of ASALH and Consultant may terminate this Agreement for any reason upon fifteen (15) days written notice to the other party, and (ii) either party may terminate this Agreement upon ten (10) days written notice of the other party's material breach of the terms of this Agreement if the breach remains uncured at the end of such ten (10) day period. In the event of such termination, Consultant shall cease work immediately after giving or receiving such notice of termination. Upon termination of the Agreement or earlier as requested by the Association, Consultant will deliver to the Association all notes, memoranda, and documents, together with all copies thereof, and any other material containing or disclosing any Work Product, or Confidential Information of ASALH. Any such termination shall not relieve ASALH of the obligation to pay any fees or expenses due or payable to Consultant for work performed prior to the effective date of such termination. Paragraphs 2 through 6, 9, 10 and 12 hereof shall survive the expiration or prior termination of this Agreement. In the event of any termination, Consultant shall be paid a pro rata portion of all amounts due up to and through the effective date of termination.

9. Force Majeure. Notwithstanding any provision contained in this Agreement, neither party shall be liable to the other to the extent fulfillment or performance of any terms or provisions of this Agreement are delayed or prevented by wars; strikes; invasion; terrorism; government action; labor strikes or slowdowns; shortages of resources or materials (including power shortages and blackouts); natural disasters; acts of God; delay or disruption of shipment or delivery; trespass or interference of third parties or, without limiting the foregoing, any other causes not within its control and which, by the exercise of reasonable diligence, it is unable to prevent.

10. Assignment; Benefit. This Agreement is for the services of Consultant and may not be assigned by Consultant, nor shall it be assignable by operation of law, without the prior written consent of ASALH. The parties' respective rights and obligations under this Agreement are binding and enforceable against the parties and will bind and inure to the benefit of their respective successors and permitted assigns.

11. Legal and Equitable Remedies. Consultant hereby acknowledges and agrees that in the event of any material breach of this Agreement by Consultant, including, without limitation, the actual or threatened disclosure of Confidential Information without the prior express written consent of ASALH, ASALH will suffer an irreparable injury, such that no remedy at law will afford it adequate protection against, or appropriate compensation for, such injury. Accordingly, Consultant hereby agrees that ASALH shall be entitled to specific performance of Consultant's obligations under this Agreement, as well as such further relief as may be granted by a court of competent jurisdiction. ASALH hereby acknowledges and agrees that in the event of any material breach of this Agreement by ASALH, Consultant will suffer an irreparable injury. Accordingly, ASALH hereby agrees that Consultant shall be entitled to specific performance of ASALH's obligations under this Agreement, as well as such further relief as may be granted by a court of competent jurisdiction.

12. Governing Law; Severability. This Agreement shall be governed by and construed according to the laws of the District of Columbia without regard to its conflict of laws rules. If any provision of this Agreement is found by a court of competent jurisdiction to be unenforceable, that provision shall be severed, and the remainder of this Agreement shall continue in full force and effect.

13. Complete Understanding; Modification. This Agreement and any exhibits or schedules hereto or thereto constitute the final, exclusive, and complete understanding and agreement of ASALH and Consultant with respect to the subject matter hereof. Any waiver, modification, or amendment of any provision of this Agreement shall be effective only if in writing and signed by Consultant and an authorized representative of ASALH.

14. Notices. Any notices required or permitted hereunder shall be given in writing to the appropriate party at the address specified on the signature page hereto or at such other address as the party shall specify and shall be delivered or sent by (a) first class U.S. mail, registered or certified, return receipt requested, postage pre-paid; or (b) U.S. express mail, or other, similar overnight courier service. Such notice shall be deemed given upon

personal delivery to the appropriate address or three (3) days after the date of mailing, if sent by certified or registered mail.

15. Counterparts. This Agreement may be executed in two or more counterparts, each of which shall be deemed an original, but all of which together shall constitute one and the same instrument.

[Signature Page Follows]

If you accept the terms of service as set forth in this letter, please date and sign this letter at the bottom and return one original copy to me. If you have any questions, please do not hesitate to contact me directly.

Best regards,



Sylvia Cyrus
Executive Director
Association for the Study of African American Life and History
301 Rhode Island Avenue, NW
Suite 2204
Washington, DC 20001

Accepted and agreed to:

By: 

Date: July 7, 2022

Address

614 S 4th Street
Suite 171
Philadelphia, PA 19147

EXHIBIT A

SERVICES

Consultant will serve as **Fundraiser** and perform the essential duties and responsibilities outlined below.

Objective:

Boswell will serve as the primary fundraiser in support of the 107th annual conference. ASALH has established a **\$150,000** fundraising goal in support of the conference.

Upon engagement, Boswell will perform the following:

- (1) Complexity analysis;
- (2) Develop a segmentation strategy, incorporating engagement metrics; and
- (3) Analyze and articulate the social value of supporting the annual conference.

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.

Scope of Work:

Boswell will:

- (1) Utilize their 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.

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 ASALH 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: (1) Constituent perceptions of ASALH's development efforts; (2) Reveal opportunities and obstacles to philanthropic growth; (3) Examination of the

philanthropic landscape, providing a competitive analysis of other nonprofits in your region (Washington, D.C. - where ASALH has its headquarters); and (4) Prospect cultivation.

- **Campaign Planning** – (1) Identify where ASALH is to date (including requests for funding, initial contacts, declinations, etc.); (2) Develop a “Case for Support”; (3) Conduct a database and wealth screening and wealth match; (4) Provide data analysis; and (5) 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 monthly reports: (1) Interim report of progress and emerging themes; and (2) Comprehensive and actionable final report.

Additionally, Boswell will: (1) Provide strategic counsel on all related campaign topics; (2) Develop cultivation and solicitation strategies during the “Planning Study”; (3) Explore and reaffirm fundraising potential within ASALH; (4) Produce an E-survey for appropriate constituents following the conference; and (5) Assess Internal Readiness (Identify staff and volunteer resources to achieve your goals).

Documents:

Boswell requests the following items and documents:

- A listing or prior funder for the conference
- A listing of the entities who have committed for 2022, inclusive of the amount of proposed funding, and contact information
- A listing of entities from which funding has been requested for this year
- A listing of declinations for this year
- A wish list of ideal funders (if any)

The submission of these documents can be in any form, including handwritten. The initiation of the engagement is **not dependent** on the acquisition of these items.

EXHIBIT B

COMPENSATION

In consideration for providing the Services, Consultant shall receive an aggregate fee of **\$42,400** for the period in which the Consultant renders the Services set forth in **Exhibit A** according to the following schedule, based upon the services completed through that period.

- **July 7, 2022 (50% Retainer) - \$5,000**
- **August 4, 2022 – (50% Retainer) - \$5,000**
- **August 31, 2022 - \$10,000**
- **September 30, 2022 - \$10,000**
- **October 31, 2022 - \$12,400**

The timeline for this engagement begins upon receipt of the initial ½ of the retainer as outlined above.

Consultant will provide ASALH with invoices for each period. ASALH will issue Consultant a Form 1099-NEC.

Any additional personnel shall be subcontracted through **Bowell Communications** in consultation with ASALH. **Boswell Communications** will be responsible for compensating any subcontractors.

Expenses:

The Association shall pay or reimburse Consultant for all reasonable, documented out-of-pocket expenses directly attributable to Consultant's provision of the Services; provided, however, that any individual expense more than \$50 shall be approved in advance by the Association.

FROM THE DESK OF

Erika L. Van Croft

July 26, 2022

Memorandum

To: W. Marvin Dulaney, President
Sylvia Cyrus, Executive Director

From: Erika L. Van Croft, Development Consultant

Re: Remaining Retainer Distribution

Following our discussion regarding the request for the distribution of the remainder of the retainer, I am submitting this memorandum in support thereof.

As I previously mentioned, while in Arizona attending to the death of my father, I was informed my godmother Juliann Lawson of Philadelphia has passed. I am now cutting my time in Arizona short to immediately travel to Philadelphia for my godmother's services, and for whom I have specific responsibilities.

In the three weeks since my engagement, I have worked diligently on behalf of ASALH - including through in-person representation - yielding substantive results. I have identified over 25 possible additional corporate and other sponsors, including in Alabama. I have initiated outreach to these entities, resulting in direct conversations about sponsorship of this year's conference, increased visibility for ASALH, and the increased likelihood of sponsorship. A brief summary of some of my activities are below, and include my using personal contacts on behalf of ASALH to effectuate results.

While the second half of my retainer is scheduled for delivery on or before August 4, 2022 - which is next week - I am requesting the retainer to be delivered on July 26, 2022 - several days ahead.

A small sample of my activities include, but are not limited to:

- Direct outreach to NIKE board*, US Black Chamber of Commerce president, NCLC, Professional sports teams, EPA, U.S. Department of Health and Human

Services, universities (including Columbia, Upenn, U of Chicago and Arizona State University), multi-national corporations, Pharma, hospitals and the medical industry, and others are amongst the outreach (the NIKE meeting is being rescheduled for week of August 5, 2022 with the board member) resulting in expressed interest for funding

- Wells Fargo - Met with and discussed sponsorship by Wells Fargo leadership and confirmed followup conversations
- Secured the Film Festival Sponsorship - 5K
- Editing and re-working of ASALH Investment Deck (including the research and identification of ideal deck samples)
- Request for Michael Regan - Developed and forwarded invitation for speaking engagement working directly with my contact in the Office of Administrator Michael Regan to maximize the likelihood of acceptance (the office had not received our previous request)
- Attended U.S. Black Chamber of Commerce Conference - represented ASALH and met with additional potential sponsors and provided follow-up (my tickets were complimentary as a personal favor to minimize cost)
- Contacted performer DOUG E. FRESH re: performing at ASALH conference; participated in followup conversations
- Secured assistance from key member of Omega Psi Phi leadership to secure the 10K sponsorship commitment - meeting previously scheduled (additional call today)
- Followed up on NMA interest and conducted conference call with Charles Johnson re: sponsorship, meeting with NMA President-elect, and possibility of in person roundtable; second meeting today to incorporate President-elect scheduling meeting with ASALH
- Outreach to Development Office of Kappa Alpha Psi following conversation with active member

AZ meetings scheduled include:

APS

AZ Informant

Previous engagements/conversations include:

Fiesta Bowl

- Additional outreach to previous sponsors:

Johnson and Johnson
Bank of America
- Incorporated suggested sponsors in Alabama in outreach
- Initiated the development of sponsor database
- Participated in no less than 4 meetings with ASALH including:
Development Committee
Michael Regan acquisition (2 meetings)
Standing Meeting with Marvin re: status update
Meeting with Sylvia and graphic designer
- Multiple conversations with Sylvia re: conference, progress, direction

As I mentioned, I have continued my work for ASALH while in Arizona to maximize the opportunities for sponsorship.

I am available for additional questions at your convenience.

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.

June 29, 2022

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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

June 29, 2022

PRIVILEGED AND CONFIDENTIAL

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

June 30, 2022

**BOSWELL ADDENDUM TO 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 the following addendum to our proposal for fundraising for services in support of the Association for the Study of African American Life and History ("ASALH") 107th Annual Meeting and Conference in Montgomery, Alabama.

I. Background

At the request of Executive Director Sylvia Cyrus, Boswell is submitting an addendum to our proposal of June 29, 2022. The addendum will seek to clarify the items ASALH may provide to assist in the assessment period at the initial stage of the fundraising engagement.

These items will allow for a more expedient assessment of ASALH's current financial standing and provide direction as to the development of the fundraising plan.

II. Documents

The items and documents requested are as follows:

- A listing of the prior funders of the conference
- A listing of the entities who have committed for 2022, inclusive of the amount of proposed funding, and contact information
- A listing of entities from which funding has been requested for this year
- A listing of declinations for this year
- A wish list of ideal funders - if any

The submission of these documents can be in any form - including handwritten. Please do not feel the need to engage in further organization of these documents. We seek to serve as an addition to your efforts, and am happy to work with which ever form you can provide this information.

The initiation of our engagement *is not* dependent on the acquisition of these items. Boswell is prepared to begin to provide services immediately. Further, if there is a discovery of additional information, items or funders (both potential or actual) throughout the course of the engagement, Boswell is happy to receive and incorporate such information into the fundraising plan.

III. Timeline

For clarity, we will be actively engaged throughout the entirety of the engagement - including holidays, weekends and throughout the month of August. Our view is that time is of the essence, and in an effort to maximize the support for ASALH and the 107th annual conference, we must incorporate all of the time available.

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