

Consulting Agreement

This agreement covers professional services to be provided by Bob Carter Companies, LLC, dba Carter, 400 Madison Drive, Suite 204, Sarasota, Florida 34236, to Southern Lehigh School District, 5775 Main Street, Center Valley, PA, in connection with the Scope of Work described below.

SUMMARY

This project includes an initial 3-month planning study to prepare SLSD for their campaign, and may be followed by a 12-month campaign management engagement.

SCOPE OF WORK

Carter is recommending the following deliverables to ensure that the appropriate campaign planning is conducted during the planning phase.

PLANNING STUDY (3 months)

Carter will:

- Collaborate with SLSD to develop an initial Case Summary to be tested. (Case Summary is the emotional document that explains the rationale for embarking on this philanthropic effort.)
- Create a Gift Pyramid for our campaign objective. (We will mutually determine the test amount.)
- Collaborate with SLSD to identify an appropriate interview sample.
- Conduct 25-30 personal interviews with select School Board members, Foundation Board members, major donor prospects, community leaders, relevant foundation and corporate leaders.
- Review the internal structure of SLSD's fundraising program to ensure that you have the resources needed to embark on this campaign and to continue to strengthen your overall fundraising program within the foundation.
- Use the information retrieved from the interviews to develop the appropriate campaign recommendations, plan, timeline and budget.
- Present a preliminary *planning study* to select members of SLSD's leadership.
- Present the final *planning study* to the entire School Board and other campaign leaders.
- Begin implementing some essential recommendations in conjunction with the *campaign plan*.



FEES AND EXPENSES

Carter's fee for the above Scope of Work is \$32,000 payable at \$8,000 per month in accordance with the following schedule. Travel, meals and lodging are included in the fee.

Fees are due as follows:

| | |
|----------|--------------|
| \$10,667 | Upon signing |
| \$10,666 | June 1, 2016 |
| \$10,666 | July 1, 2016 |

TERM OF AGREEMENT

This agreement shall commence May 16, 2016 and conclude August 15, 2016. It is renewable by mutual agreement. Services are to commence with respect to the solicitation of contributions in Pennsylvania on the date the contract is submitted to the Bureau of Charitable Organizations or the effective date of the contract, whichever is later.

CANCELLATION CLAUSE

This agreement can be cancelled by either party upon 30 days' notice in writing. Work accomplished prior to that date will be billable. Notice of cancellation must be sent to Carter, 400 Madison Drive, Suite 204, Sarasota, FL 34236.

CLIENT RESPONSIBILITIES

Southern Lehigh School District is responsible for providing pertinent data associated with Carter successfully providing services described above. Southern Lehigh School District will keep Carter well informed of all matters that may have bearing on their work on behalf of Southern Lehigh School District. Southern Lehigh School District is responsible for registering as a fundraiser in all appropriate jurisdictions.

CONFIDENTIALITY

Carter shall, during and subsequent to the term of this agreement, hold as confidential all data and information received as a result of the duties and activities as outlined herein. This information will not be used in any way except as necessary to fulfill the obligation described above.

GOVERNING LAW AND PROVISIONS

This agreement shall be enforced in accordance with and the parties shall be governed by the laws of the Commonwealth of Pennsylvania, USA. In accordance with those laws, Carter shall at no time have custody or control of any contributions to Southern Lehigh School District. Southern Lehigh School District exercises control and approval over the content and volume of any solicitation.

CARTER

Accepted and Agreed:
For *Bob Carter Companies, LLC, dba Carter*

For Southern Lehigh
School District



Robert E. Carter
Chairman
April 18, 2016

Signature

Print name and title

Date: _____

Signature

Print name and title

Date: _____