



REQUEST FOR PROPOSAL

Presented
December 23, 2022
by:





December 23, 2022

National Parks Conservation Association
777 6th Street, NW, Suite 700
Washington, DC 20001-3723

Attn: Laura Conners, Vice President of Membership

Dear Laura,

Thank you for the opportunity to participate in the proposal process for National Parks Conservation Association (NPCA) for Caging, Gift Processing Services, Gift Acknowledgement Services, and Premium Warehousing and Fulfillment. It would be an honor to expand our relationship to further support your teams and your mission. We are pleased to present you with our proposal response for Gift Acknowledgement and Premium Warehousing and Fulfillment. All information contained herein is confidential.

Strategic partnerships are vital to the execution of your direct mail programs. With the challenges facing our industry, it is increasingly important to select the right partner, one with proven accountability to NPCA and one with a deep bench of resources and contingency plans available to you.

Production Solutions intends to continue to help NPCA by providing exceptional client service while executing your production needs on schedule at competitive and consistent costs. We would own and manage the critical, intricate administrative and planning needs of your robust Acknowledgement and Fulfillment programs. Your time will be freed up, efficiencies gained in your workflows and processes streamlined by working with PS as your trusted partner on these additional programs.

If you have any questions regarding this proposal, you may reach me either by phone at 301-814-0544 or by email at mferguson@psmail.com.

Thank you again for the opportunity to participate in this process and we look forward to your feedback.

Sincerely,

A handwritten signature in black ink that reads "Meg Ferguson". The signature is written in a cursive, flowing style.

Meg Ferguson, CFRE
Business Development Director, Production Solutions

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WRITTEN RESPONSE



Production Solutions Background

Proudly serving the nonprofit community for nearly 35 years, Production Solutions, Inc. (PS) is one of the nation's top direct-response production management firms. Our promise is simple: we exist to benefit and enhance your organization. Our vision is all about inspiring more people to give, and our purpose is to create solutions that elevate the experiences of others. Headquartered at 1953 Gallows Road, Suite 500, Vienna, VA 22182, PS is situated right outside of Washington, D.C. Founded in 1987 as a privately-owned S-Corporation by George Lizama and Greg Albright, PS was purchased by Moore of Tulsa, Oklahoma in November 2016.

Nonprofit organizations, such as NPCA, can acquire new donors and consistently deliver impactful donor messages in the most effective ways possible through PS' customized solutions. We have a large footprint specifically in nonprofit direct mail fundraising and produce over 500 million pieces of mail annually for organizations and their agency partners. With a unique blend of historical knowledge, unmatched buying power, nonprofit expertise, package format ideas, specialized management processes, quality control proficiency and trending insights, you receive the best production management value in the market.

Our Commitment to Diversity, Equity and Inclusion

In September 2020, the Moore Enterprise, under the leadership and guidance of CEO Gretchen Littlefield, launched the Moore Enterprise Diversity, Equity and Inclusion (DEI) endeavor. This launch is intended to become the DEI standard for Moore, and all individual brands that are aligned within the Moore Enterprise umbrella. This DEI launch commenced with the selection of the DEI journey guide, and partner consultant, Dr. Tyrone A Holmes, Ed.D. (www.drtyroneholmes.com). The ultimate outcome for Gretchen and Dr. Holmes, was to ensure that all 28 brands would work in a closely coordinated and collaborative manner initially, and in perpetuity, to cultivate a committed experience and delivery of DEI throughout all of Moore, with no exceptions.

With that overview shared – our DEI statement and intentions are as follows:

We at Production Solutions, a Moore company, are of many different faiths, backgrounds, and core truths. Yet we all believe a life of purpose and service to one another provides deep satisfaction. We live this in our work, where we respect our common humanity and our diverse experiences which make us stronger together. We all benefit when varied voices speak, lead, and are valued. When we value diverse viewpoints and people we earn the best talent, imagine the best innovations, and deliver the best results to everyone.

We will accomplish this through these 5 Pillars of Success:

1. People - Our employees will experience dignity, fairness, and respect from each other. They will also express that same dignity, fairness, and respect for other employees at all times.
2. Organization - We will fuel our clients' growth with a continually more diverse, equitable, and inclusive organization and ecosystem.
3. Clients - Our passion for our clients' success means we will enlist diverse supporters in the service of their missions. We will also present their stories equitably.

4. Partners - We will engage our partners to advance diversity, equity, and inclusion through necessary conversations around mutually beneficial policies and practices. We ask them to do likewise with us.
5. Community - We work to raise the bar for our industry through our quality and innovation; so too will we work to lead our industry for diversity, equity, and inclusion.

Our commitment to this journey is being tracked with the following SMART goals:

- Create a DEI plan
- Establish and distribute a supplier DEI policy
- Identify business metrics to evaluate effectiveness
- Develop DEI competencies for performance reviews
- Launch a supplier diversity survey
- Explain and connect DEI plan to the Production Solutions staff
- Develop a DEI-focused recruitment policy and training
- Review compensation and benefit policies
- Create and launch a formal mentoring program
- Develop an ongoing DEI learning series

We invite you to follow us as we continue to make progress on our DEI goals here:

www.productionsolutions.com/about/our-dei-commitment/.

Our Primary Areas of Specialty

Production Solutions operates as an extension of our clients' fundraising and marketing internal teams and external agency partners. Our unique competitive advantage is that we serve as a strategic partner that goes well beyond managing print, mail and fulfillment - we are experts specifically in fundraising direct mail. This independent, yet collaborative business approach allows fundraising teams to focus strictly on those aspects of their core function – therefore improving results, and creating more impact with targeted and integrated messaging and content. Time is saved, budgets are maximized, risk is mitigated and creativity is unleashed.

Our areas of specialty include:

- Print and lettershop procurement management
- Data processing
- Postal logistics management
- Mail tracking
- Fulfillment
- Inventory management and storage
- Campaign management designed for maximum ROI
- Identification of efficiencies and cost-saving opportunities
- Production assessments
- Education, including client training and industry updates

Being a good partner to you means being a good partner to your partners – Avalon Consulting Group, ROI Solutions, Engaging Networks, Arch-E, Wells Fargo, and more. We work productively with production facilities, agencies, cagers, databases and data providers every day. Our core values of passion for our clients and service to others mean we will work to make them successful for you. PS leverages a diverse supplier base and customized sourcing strategies to support your needs. Our approach is tailored by matching the production requirements within each direct response program with the latest technologies and capabilities available from the nation's top manufacturers, lettershops and fulfillment providers.

Additional Services - We Are More Than Production

Given the amount of fundraising experience the PS account team holds, we strive to serve as your strategic partner in addition to executing your direct mail production and fulfillment. Below are a few examples where we have brought forth information and access to innovative opportunities with the intention of improving results and/or providing savings, as well as additional benefits.

- **USPS Information, Management and Promotions:** PS provides details on optimal shipping methods, tracking and USPS promotions and incentive programs. We do the heavy lifting of registration for such campaigns for NPCA to realize the cost savings and increased brand exposure to your mail pieces.
- **Cost Containment:** We take a holistic approach to your programs seeking to manage them in the most efficient and effective manner possible. This is particularly important during current market conditions and rising commodity and postage costs. We do not charge for program audits, quarterly work reviews and/ or training sessions, nor do we charge for press inspections, mail tracking or any of our value-added services.
- **Innovative Formals, Trends and Techniques:** PS continually provides formal and informal innovative formats presentations for our nonprofit and agency partners' consideration.
- **Staff Training:** We love sharing our knowledge and expertise through Production 101 training, Informed Delivery overviews, and USPS training throughout the year.
- **The Power of Moore:** We can connect our clients to resources within the many companies that make up the Moore enterprise. We have experts in all aspects of fundraising including DRTV, CTV, List Segmentation, Data & Analytics, Caging, Public Relations, and more.

Quality Control and Inventory Management

PS's internal quality control measures include a specialized QC process with additional steps for reviewing live production in real-time to ensure accuracy throughout the production process. Inventory management is a critical component for regular gift acknowledgments and fulfillment and we take it very seriously. We'll establish minimum thresholds, monitor inventory levels accordingly and report levels weekly. We can even give you access to a web portal for real-time visibility into your inventory. We will conduct an annual physical inventory in July, or when needed. Given we manage your Acknowledgement printing currently, managing their mailing will allow us even more ownership of your program and allow for a more proactive role in projecting component needs and making recommendations for reprints required to keep your donors promptly acknowledged and appreciated and receiving their requested premium(s) efficiently.

PS prides itself on being a trusted, accountable partner serving as a true extension of your team. Assimilation, development and execution of standard operating procedures, and knowing your organizational requirements and

preferences are critical to our collective success. We will own the critical, intricate administrative and planning needs of your robust Acknowledgement and Fulfillment programs.

The goal is always to prevent mistakes and missteps but if something goes wrong, we are always active participants in the resolution. As your committed partner, we do what is necessary to ensure you are fully satisfied with the outcome.

Our 30 years of service in the nonprofit fundraising industry have afforded us a significant amount of exposure to what works well and an awareness of the many pitfalls that can adversely impact Acknowledgement and Fulfillment programs. We've taken that historical knowledge and invested in people and technology to enhance and refine our production management processes and quality control measures. Service and quality must be complemented by people with a genuine desire to deliver positive results. PS is dedicated to a healthy organizational culture that fosters and encourages those that serve you to bring about the best production management quality, value, and experience every day.

Simply put, we define "quality" as:

- Producing clients' work consistently and on time, accurately
- Responding to our clients' needs and requirements, and
- Striving to deliver an impeccable service experience, every time.

The goal throughout the quality control process is to minimize the amount of time our clients' team spends reviewing the various checkpoints in the process. Your account team will customize production management SOPs and provide approval documents and files that are reviewed first to ensure accuracy upon the initial review, while advising on any areas of opportunity or possible quality enhancements. Further, as specialists in the nonprofit fundraising industry, our quality control procedures and training are built around the complexities and nuances of programs such as NPCA's Acknowledgements and Fulfillment services.

We understand that the more time you focus on strategy and planning, and the less time you worry about production and inventory management, the more effective you can be in your role, leading to better results for NPCA's fundraising campaigns.

**Please see the appendix for a sample Inventory Report.*

Reporting and Mail Tracking

Mail tracking is essential for the health of nonprofit programs and the results are used to inform the strategy of future mailings. PS partners with Gray Hair Software, an industry leader in mail tracking solutions, for 95% of our outbound mail. In limited situations, we may opt to use other services that deliver the same value, when the format dictates. Deliverability and mail tracking are critical elements to our work and significant areas of focus for the PS team.

We would stringently monitor mail tracking reports and deliverability for your Gift Acknowledgement program and provide the following:

- Individual job mail tracking information is included in the weekly updates and also as line items in the schedules. This allows for a final summary of delivery percentages and a quality check of the USPS.
- Monthly reports detailing average in-home dates for both Marketing and First Class mail (includes year-over-year and seasonal trends).
- USPS updates on mail operations impacted by hurricanes, wildfires, and other natural disasters, in the event NPCA wishes to suppress any or all affected zip codes.
- A variety of automated and/or customized reports can be developed for the NPCA team at any time.

Transition Plan & Benefits

Our goal is an onboarding experience that is detail-oriented for PS, and easy for NPCA. Our proven processes are smooth, provide thorough documentation and a fast turnaround to get your programs established and fulfilled efficiently. Production Solutions currently manages your Acknowledgment print needs so adding Acknowledgment processing and mailing as well as Fulfillment to our purview allows us to take ownership of your inventory management truly. This will give us increased visibility and allow us to provide a more proactive and strategic partnership that yields better results and a more streamlined process for NPCA. This transition would be incredibly smooth given our existing healthy long-term relationship and the deep institutional knowledge we have gleaned about the NPCA programs over the past 26 years. We are prepared to begin the transition on January 31, 2023, or sooner!

A Team Built for Your Success

Account Team

We support all our clients with a robust, highly experienced account team, that includes a primary Account Manager and additional points of external escalation and internal issue resolution via your assigned Production Director, and your Business Development Director. Each primary Account Manager has additional Account Managers that can be leveraged for either backup or redundancy based on client needs. There is no shortage of talent and expertise available at a moment's notice, for any given situation, assuring your components are produced accurately and on time.

Resource Team

Our Resource team is behind the scenes, supporting your Account Management team. The Resource team specializes in USPS requirements, regulations, and promotions as well as vetting new sourcing options, redundancy planning, manufacturing innovations, supplier management, data privacy, logistics, mail tracking, production issue resolution, environmental sustainability, packaging and more. They are an essential component to our ability to proactively serve NPCA, freeing your day-to-day contact to focus on delivering quality, accurate, and efficient production and fulfillment implementation.

Leadership Team

Your PS team also includes the PS Executive Leadership team. Our President, COO and VP of Production all have first-hand experience with the ins and outs of direct mail production and have grown into their leadership roles from the level of Account Manager to senior leadership of the company. Their individual experience and expertise in

production are remarkably strong and are coupled with a spirit of continuous improvement. This executive leadership team constantly seeks opportunities for PS to maximize efficiencies, and prioritize the people at the heart of the donor exchange, which leads to impeccable service experiences. They are committed to the pursuit of futuristic, innovative, agile, creative solutions to problems which provide our clients with not only best-in-class production management but also a strategic partnership that elevates your donor's experience.

Ultimately, there is no problem too complex or too large that we cannot find a solution to when this entire team comes together.

Below is an introduction to your PS team, which will continue to be customized and refined to fit the needs and experience required to manage your evolving programs.



Ben Harris, President

Ben has served with PS since 1998. Ben leads fearlessly and from the heart, which inspires the PS team to do their absolute best work every day. He leads by example, invests his time in the people and culture of PS, communicates authentically, fosters a learning environment for his staff. Ben is constantly inspiring and engaging his colleagues and refers to himself as the “Chief Employee Officer”, with a people-focused approach. This leadership is what empowers PS’ thriving work and keeps our team in alignment with our mission. Splitting his time between California and Virginia, Ben enjoys spending time at the beach and hosting parties with his wife, Brooke, and their three kids.



Drew Wilson, Chief Operations Officer

Drew has been with Production Solutions since 2003. As COO, He oversees the Production, Resource, Accounting, and Information Technology divisions by coaching and managing the departments’ leaders. He is also integral in determining and integrating the company’s vision, purpose and leadership values. Drew has held several roles with the company, such as the Director of Continuous Improvement where he launched "PS University", our training and professional development division. He is active in the DMAW and is a certified Project Management Professional (PMP) ®. Drew lives in Michigan and enjoys spending time with his wife, Kelly, his daughter, Hadley, and their dog, Oscar.



Paul Cornetta, Vice President of Production

Paul, a dedicated leader and the VP of Production, has been with PS since January 2011. With 23 years of experience in magazine production in multiple different positions, Paul’s expertise in the industry and in managing and motivating teams is unmatched. Paul served PS as an Account Manager before transitioning to Production Director. Paul is the father of four children. He and his wife Liz enjoy time with their youngest son Alex and Paul’s grandson Luca who is nine months older than Alex. Paul has an interest in history, is a huge NY Mets and Giants fan, and loves Italian food.



Leigh Janis, Vice President of Sales & Client Experience

Leigh, a performance-driven leader, is PS' Vice President of Sales & Client Experience. Leigh is passionate about supporting clients and works cross-functionally with a growth mindset to meet our client's goals. Leigh leads the Business Development and Marketing teams with vision and inspiration. She resides in Northern Virginia and she enjoys spending time with her husband, Justin, their children, Johnny, Luke and Lillian, and their loyal dog, Max. Leigh is a Certified Level-2 Story Facilitator, and she loves cheering on her children at their baseball and football games, she coaches basketball and teaches yoga.



Carolyn Angelini, Director of Resource and Postal Affairs

Carolyn joined the PS team in 2016. With over 24 years of experience in our industry, Carolyn has deep knowledge about sourcing and managing supplier relationship across various operational areas and a significant portion of her career has been focused on direct mail, fulfillment and postal topics. She is from Randolph, New Jersey and she telecommutes full-time from Philadelphia, Pennsylvania. Carolyn enjoys spending time doing Crossfit, volunteering in her kids' Cub Scout Pack and swooning over Mid-Century modern architecture and furnishings.



Meg Ferguson, Business Development Director, CFRE

Meg brings more than 20 years of direct marketing, fundraising campaign and production management experience to the NPCA team. As a Certified Fundraising Executive (CFRE), Meg has a strong track record in strategic creation and implementation of direct marketing campaigns for a variety of nonprofit organizations and sectors. Her experience working directly with clients, and her CFRE accreditation enable Meg to understand a broader scope of philanthropic fundraising, including relationship building, ethics, accountability and long-term sustainability. Meg is an educator, industry leader, and current Board Member for the DMAW. She resides in Pasadena, MD with her two sons and her fur daughter.



Don Poudrier, Production Director

Don, an enthusiastic leader, has been with PS since 2012. Don has over 30 years of experience in the industry. When he joined PS, he found that he finally found his "home" at what he calls the "Mecca of Direct Mail." He utilizes his experiences and continued growth to set up clients, suppliers and Production Solutions for success. Don is from Owings, Maryland, and he enjoys volunteering at his church and within the community, spending time with his wife, kids and friends. Don is the youngest of seven, served in the Air Force for four years and lived in Turkey for 18 months, which he calls one of the best experiences of his life.



Debbie Smith, Senior Account Manager

Debbie is a cheerful and dedicated hard worker. She has been with PS since 2010. With her deep well of industry experience, Debbie delivers an impeccable service experience and she is known for her strong attention to detail. Her clients enthusiastically report that they are fortunate to have Debbie's wealth of knowledge, her dedication to a service experience like no other as well as her kind-hearted, joyful demeanor working on their missions. Debbie is from the Bronx, New York, and currently lives in Virginia. Some of Debbie's interests are classic movies, all kinds of animals and shopping.



Samantha Wright, Account Manager

Samantha is a positive, enthusiastic team player, who naturally creates personal connections that forge strong relationships. With over 30 years of experience in the direct mail and fundraising industries. With a background in direct mail and fundraising for nonprofits, as well as production and direct marketing, Samantha is a subject matter expert in coordinated printing, list ordering, mailing services, program development, creative direction, and more. Samantha resides in Northern Virginia, and in her free time can be found enjoying the outdoors, hiking, surfing, paddle boarding, and leading Power Yoga classes as a fitness instructor.



Chris Azbill, Senior Account Manager

Chris has been serving with PS since 2014 as an Account Manager. Chris' prior work includes Vice President of Operations in several different printing companies. Chris earned an MBA and he has over 30 years of experience in the direct mail and nonprofit industries. Chris' ability to understand and convey his clients' vision and mission is inspiring. Chris telecommutes full-time from Tampa, Florida, and he enjoys playing tennis and spending time with his yellow labs. Chris is retired from the US Navy, and (fun fact!) his wife, Shannon, also works for PS as a member of the Resource Team.

Postage Escrow

PS is pleased to offer management of postage funds through an escrow account. The following is the list of guidelines and requirements to start and maintain a postage escrow:

- An NPCA escrow account can be established with a balance of \$5,000.00 to be maintained as the monthly average
- When applicable, any unused/refunded postage funds would be returned to the escrow after the completion of a job.

- A Monthly Escrow Statement is distributed to NPCA by the 15th of each month with the detailed transactions.
- NPCA postage escrow could be used for other/all NPCA programs as well.

** Please see the appendix for a sample of our Postage Escrow Report.*

Fee Structure

Strategic partnerships are vital to the execution of your direct mail programs. With the challenges facing our industry, it is increasingly important to select the right partner, one with proven accountability to NPCA and one with a deep bench of resources and contingency plans and partners available to you.

Our nonprofit expertise, specialized management processes, quality control proficiency, and deep bench of professionals available to NPCA will save time and money, and mitigate risks generated by current market conditions as well as the many pitfalls of production management. At PS we operate as your asset and risk managers.

Our proposed pricing structure would be a pass-through of all associated costs for your Gift Acknowledgement and Premium Warehousing and Fulfillment programs, plus a monthly management fee for our services.

**Please see the Pricing section for additional detail on all fees associated with each program.*

Data Privacy & Security

Production Solutions (PS) takes security, data security, and privacy with the utmost attention to ensure the confidentiality of our client's mailing lists and sensitive personal identifiable information (PII) of its data subjects. PS has been maturing our overall information security management program over the past two years.

We treat our client's sensitive PII data and files with security and privacy awareness throughout our organization and project team members. PS has a fully mature implementation of data security and data privacy-related policies and procedures which includes:

- Acceptable Use Policy
- Data Classification Policy
- Data Encryption & Key Management Policy
- Privacy Policy Statement
- Disaster Planning
- Secure File Transfer Protocol Systems (SFTP)

Sensitive PII Data Handling (Files & Data) – Internal & External – Policy

In addition, PS has deployed for all clients, suppliers and vendors the use of secure data containers and secure transmission solutions hosted and managed by PS' IT organization.

Once PS obtains our client's sensitive PII data files, these are stored in secure data containers that support data encryption at rest and transmission. These tools and transmission solutions were implemented to ensure the confidentiality of our client's sensitive PII data files and data itself. PS has implemented the following solutions to support our clients and their sensitive PII data files:

- PS hosted and managed, Secure File Transfer Protocol (SFTP) Server with access controls, encrypted transmission, and continuous monitoring by our SIEM platform PS secure email portal (MIMECAST) for encrypted communications and sending of email attachments that may contain sensitive PII data or files to/from clients, suppliers, and our partners
- Secure, external data storage containers, as needed, to support clients that require regulatory compliance or security certifications such as SOC2, Type I or Type II attestations, etc.
- Real-time continuous monitoring with our managed security service provider (MSSP) partner, threat monitoring and alerting, and incident response support as needed

PS stands ready to adapt our security controls and requirements to our client's needs. This can include "heightened" security controls that may be required for regulatory compliance or other security certifications to maintain compliance. In either case, PS can support security and privacy throughout our people, process, and technology production environment in alignment with our client's needs.

PS is also happy to provide a copy of our insurance certificates upon request.

References

Special Olympics

Shira Mitchell | *Senior Vice President, Development*

1133 19th Street NW, Washington, DC 20036

P: 216.402.8566 | E: smitchell@specialolympics.org

Special Olympics and PS have partnered for 6 years, and they utilize Revolution Online as their database of record.

Ocean Conservancy

Amy Fonville | *Director, Membership*

1300 19th St NW, 8th Floor, Washington, DC 20036

P: 202.351.0479 | E: afonville@oceanconservancy.org

Ocean Conservancy and PS have partnered for 24 years and recently expanded our relationship to include Fulfillment in our scope of services.

American Cancer Society

Amy George | *Director of Direct Marketing Strategy*

3380 Chastain Meadows Parkway, NW, Suite 200, Kennesaw, GA 30144

P: 800.227.2345 | E: amy.george@cancer.org

American Cancer Society and PS have partnered for 6 years and PS implemented a comprehensive customized and automated process to efficiently fulfill their acknowledgments three times weekly. Please see our Case Study in the appendix for more detail on our successful partnership.

PRICING



NPCA Weekly Gift Acknowledgment and Premium Fulfillment Program Pricing

Production Solutions would be honored to own and manage the critical, intricate administrative and planning needs of your robust Gift Acknowledgement and Fulfillment programs. Your time will be freed up, efficiencies gained in your workflows and processes streamlined by working with PS as your trusted partner on these additional programs.

Our proposed pricing structure would be a pass through of all associated costs for your Gift Acknowledgement and Premium Warehousing and Fulfillment programs, detailed below, plus a monthly management fee.

PS Monthly Management Fee

- \$2500/month

Premium Fulfillment

77,000 premiums/year or approximately 1,600/weekly file

Receive and warehouse the various materials such as bucket hats, satchels, plush bison, mini lanterns, messenger bags, folders, travel inserts, envelopes, letter & member card forms, bre's, postcards, paper inserts, etc.

Receive weekly files

Print and affix carrier approved address labels to prepacked premiums, prepare for USPS and mail.

IT/Data Processing Services:

- \$200 Initial system integration fee (one-time fee)
- \$50/file layout for initial import programming (one-time fee)
- \$75/file processed set-up fee
- \$10/code presorted & NCOA if required
- \$.10/record processed, and label printed with return address and postal indicia or carrier compliant label if not a presort group (one-off requests)

Premium Fulfillment Services:

- \$.35/each premium package to affix carrier approved label; prepare for USPS and mail
- \$3.35/each re-ship request fulfilled
- \$50 file layout perversion; only charged once or when file is updated
- (\$750/month minimum fulfillment charge which should not apply based on projected volumes)
- \$35/hour to conduct annual physical inventory in July or when needed
- \$13/pallet/month storage fee
- Postage funds can be managed through an escrow account

Park Pak Kit:

1,400/year or approximately 25-30/week

Collate 6 inserts into a folder, then into an envelope, print and affix carrier approved address label, prepare for USPS and mail (no match).

- \$75/lot set-up for each mailing/file processed
- \$.75/each for Park Pak Kit to insert 6 pieces into a folder then into envelope, affix address label and mail \$.75/Kit (No minimum processing fee)
- \$3.35/each re-ship request fulfilled
- (\$750/month minimum fulfillment charge which should not apply based on projected volumes)
- \$35/hour to conduct annual physical inventory in July or when needed
- \$13/pallet/month storage fee
- Postage funds can be managed through an escrow account

Gift Acknowledgment

Insert and mail approximately 500 each per week of the Additional Gift Low Dollar (postcard, no match), Additional Gift (no match) & Mid-Level Acks (2-way match).

Insert and mail approximately 4,250 per week of the Renewal/Rejoin (no match) & New Join (no match) packages.

Insert and mail approximately 1,200-1,500 per year of the Planned Giving Acks (2-way match).

Insert and mail approximately 800-1,000 per year of the Major Gift Receipt packages (2-way match) receive 3-5 files/week, must mail in 1-2 days.

IT/Data Processing Services:

- \$200 Initial system integration fee (one-time fee)
- \$50/file layout for initial import programming (one-time fee)
- \$75/file processed to include Grayhair if required
- \$10/code presorted & NCOA if required

Acknowledgment Fulfillment Services:

- **\$.25/Additional Gift Low Dollar Postcard Package** - address printed on labels or directly on PC; trayed and prepared for USPS and mail
- **\$.34/Additional Gift Window Carrier Package** - personalized letter printed 1 page black on supplied 8.5x11" letterhead; insert 2 into window envelope, no match, seal, meter and mail
- **\$.51/Mid-Level Package** - address printed direct onto carrier; personalized letter printed 1 page black on supplied 8.5x11" letterhead; insert 3 into closed face envelope, 2-way match, seal, meter and mail
- **\$.40/Renewal/Rejoin Package** - personalized letter with member card printed 1 page black on supplied form; insert 3-4 into window envelope, no match, seal, meter and mail +\$30/personalized letter and member card one-time set-up or change fee/version change

- **\$.40/New Join Package** - personalized letter with member card printed 1 page black on supplied form; insert 3-4 into window envelope, no match, seal, meter and mail +\$30/personalized letter and member card one-time set-up or change fee/version change
- **\$.54/Planned Giving Package** – address printed direct onto carrier; personalized letter printed 1 page black on supplied 8.5x11” letterhead; insert 4 into closed face envelope, 2-way match, seal, meter and mail
- **\$.54/Major Gift Receipt Package** - address printed direct onto carrier; personalized letter printed 1 page black on supplied 8.5x11” letterhead; insert 4 into closed face envelope, 2-way match, seal, meter and mail
(\$20/batch minimum charge)
- \$25/batch personalized printing minimum charge
- \$30/batch insertion sample scans for approval if required
- (\$200/batch (weekly) minimum charge which should not apply based on projected volumes)
- (\$750/month minimum fulfillment charge which should not apply based on projected volumes)
- \$35/hour to conduct annual physical inventory in July or when needed
- \$13/pallet/month storage fee
- Postage funds can be managed through an escrow account

APPENDIX



PRODUCT SUMMARY REPORT

SYSTEM(s): SFSW01
Selected Owners

Print Date: 12/22/2022

Print Time: 12:00 PM

System ID: SFS120
Client Name: Production Solutions

Sort/Group By: Company Name, Product Type, Sort Level 1
Then By: Product ID - Left Aligned
Zero Balances Suppressed Discontinued Products Suppressed
Shipping Transactions Included Pull Type Transactions Included
Offset Component Usage w/Assemblies Included
All Items

) Eastern Time US & Canada

Product Id	Product Description	On Hand	On Order	Reserved	Unavailable	Available	Replenish Point	Back Ordered	Expected	Ave. Mthly Usge Past 12 Mnths.*
Owner :										
Type : Regular										
Receive EMail Notification - Yes										
CAL2023	2023 Calendar	525	0	0	0	525		0	0	240
CAP0001	Blue Eco-Ring Baseball Cap	3,800	0	0	0	3,800		0	0	0
CAP0002	Blue Eco-Ring Winter Cap	1,436	0	0	0	1,436		0	0	0
CAP0003	Blue Penguin Winter Cap	2,687	0	0	0	2,687		0	0	0
CAP0004	Blue Seahorse Winter Cap	1,950	0	0	0	1,950		0	0	0
CAP0005	Green Banded Winter Cap	2,240	0	0	0	2,240		0	0	0
CAP0006	Navy Start a Sea Change Baseball Cap	634	0	0	0	634	0	0	0	0
CAP0007	Teal Turtle Winter Cap	2,368	0	0	0	2,368		0	0	2
ENV0001	Reject Envelopes (EST Use Only)	3,234	0	0	0	3,234		0	0	0
ENV0002	9x12 Peel & Seal White Envelopes	1,420	0	0	0	1,420		0	0	240
ENV0003	6x9 Utility Mailer	224	0	0	0	224		0	0	0
FLY0001	Take 5 For Turtles Flyer	19,272	0	0	0	19,272		0	0	0
LAB0001	Labels (1label = 1)	15,000	0	0	0	15,000		0	0	0
LTH0001	Letterhead	2,472	0	0	0	2,472		0	0	0
PLU0001	Plush Harp Seal	1,900	0	0	0	1,900		0	0	0
PLU0004	Plush Dolphin	1,400	0	0	0	1,400		0	0	0
PLU0005	Plush Otter with Star	1,916	0	0	0	1,916		0	0	0
PLU0006	Plush Polar Bear	1,936	0	0	0	1,936		0	0	0
PLU0007	Plush Whale	786	0	0	0	786		0	0	0
PLU0008	Plush Speckled Turtle	469	0	0	355	114		0	0	0
PUZ0001	Jellyfish/Crinojd Puzzle	43,951	0	7,025	4	36,922	3,000	0	0	448
PUZ0002	Garibaldi Fish Puzzle (School of Fish)	1,693	0	3	0	1,690	3,000	0	0	4
PUZ0003	Clownfish Puzzle (Single Fish)	4,095	0	0	4,095	0	3,000	0	0	20
PUZ0004	Turtle Gang and Fish Puzzle	12,678	0	906	0	11,772	3,000	0	0	102
SCA0001	Blue Eco-Ring Winter Scarf	784	0	0	0	784		0	0	0
STR0001	Metal Straw	3,091	0	0	0	3,091		0	0	0
TOT0001	Blue Tote w/Baby Turtles	193	0	0	0	193		0	0	0
TOT0004	Natural Canvas Logo Tote	4,294	0	0	0	4,294		0	0	0
TOT0005	Mini Cooler Tote	4,515	0	0	0	4,515		0	0	0

TOT0007	RockFlowerPaper Turtle Tote IPG	2,049	0	0	0	2,049	0	0	200
TOW0001	Beach Towel	12,000	0	0	0	12,000	0	0	0
TSH0001	Light Blue Octopus T-Shirt	1,626	0	0	0	1,626	0	0	0
TSH0002	Ice Grey Seahorse T-Shirt	245	0	0	0	245	0	0	0
TSH0003	Angel Fish Blue T-Shirt	1,826	0	0	0	1,826	0	0	0
TSH0004	Purple Polar Bear Trio T-Shirt	1,373	0	0	0	1,373	0	0	0
TSH0005	Navy 50th Anniversary T-Shirt	3	0	0	0	3	3,000	0	1,596
TSH0006	Blackberry Baby Turtle T-Shirt	1,912	0	0	0	1,912	0	0	0
TSH0007	Dolphin on Black T-Shirt	5,533	0	0	0	5,533	0	0	0
TSH0009	Whale on Blue T-Shirt	811	0	0	0	811	0	0	0
TSH0010	Gravel Sea Lion T-Shirt	5,393	0	0	0	5,393	0	0	3
TSH0011	Midnight Teal Turtle T-Shirt	4,537	0	616	0	3,921	3,000	0	2,489
TSH0012	Purple Manatee on Purple T-Shirt	6,066	0	0	0	6,066	0	0	0
TSH0013	Royal Blue Penguin T-Shirt	7,491	0	0	0	7,491	0	0	0
TSH0015	Yellow Haze Coral T-Shirt	348	0	0	0	348	0	0	0

* The Average Monthly Usage is calculated based on the past 12 "complete" months.

SAMPLE



1953 Gallows Road
Suite 500
Vienna VA 22182

SAMPLE CLIENT - ESCROW STATEMENT

Date		Description	Beginning Balance	Deposit	Withdrawal	Ending Balance
2/1/2022		Escrow Received		\$ 38,201.45	\$ -	\$ 38,201.45
2/2/2022	62257	62257 12.21 Acquisition		\$ -	\$ (1,692.34)	\$ 36,509.12
2/2/2022	64844	64844 Winter 2021 Newsletter		\$ -	\$ (1,721.96)	\$ 34,787.16
2/10/2022	65118	65118 Acknowledgements		\$ -	\$ (41.45)	\$ 34,745.71
2/10/2022	65680	65680 Acknowledgements		\$ -	\$ (117.41)	\$ 34,628.31
2/23/2022		Escrow Received		\$ 8,262.15	\$ -	\$ 42,890.46
				\$ -	\$ 0.00	\$ 42,890.46
				\$ -	\$ 0.00	\$ -
			\$ 42,890.46	0.00	01/00/00	\$ 42,890.46
3/3/2022	64848	64848 Renewal 5		\$ -	\$ (3,968.44)	\$ 38,922.02
3/3/2022	64842	64842 02.22 Acquisition		\$ -	\$ (15,412.45)	\$ 23,509.57
3/3/2022	65680	65680 Acknowledgements		\$ -	\$ (114.01)	\$ 23,395.57
3/3/2022	64847	64847 Renewal 4_02.22 Appeal		\$ -	\$ (2,510.56)	\$ 20,885.01
3/9/2022	66119	66119 Acknowledgements		\$ -	\$ (198.34)	\$ 20,686.67
3/19/2022	64842	64842 02.22 Acquisition		\$ -	\$ (1,258.09)	\$ 19,428.58
3/23/2022		Escrow Received		\$ 40,934.04	\$ -	\$ 60,362.62
3/23/2022	65680	65680 Acknowledgements		\$ -	\$ (114.01)	\$ 60,248.61
3/23/2022	66295	66295 Acknowledgements		\$ -	\$ (66.74)	\$ 60,181.87
3/23/2022	64848	64848 Renewal 5		\$ -	\$ (2,347.90)	\$ 57,833.98
3/24/2022	64843	64843 04.22 Acquisition		\$ -	\$ (6,113.63)	\$ 51,720.35
3/26/2022	64849	64849 Renewal 6_04.22 Appeal		\$ -	\$ (2,104.65)	\$ 49,615.70
3/30/2022	66119	66119 Acknowledgements		\$ -	\$ (193.58)	\$ 49,422.12
				\$ -	\$ 0.00	\$ 49,422.12
				\$ -	\$ 0.00	\$ -
			\$ 49,422.12	0.00	01/00/00	\$ 49,422.12
4/5/2022	64845	64845 Spring 2021 Newsletter		\$ -	\$ (833.75)	\$ 48,588.37
4/13/2022	66295	66295 Acknowledgements		\$ -	\$ (65.76)	\$ 48,522.61
4/21/2022	66678	66678 Acknowledgements		\$ -	\$ (112.35)	\$ 48,410.27
4/21/2022	66119	66119 Acknowledgements		\$ -	\$ (193.58)	\$ 48,216.69
4/28/2022	64843	64843 04.22 Acquisition		\$ -	\$ (13,788.17)	\$ 34,428.52
4/28/2022	64849	64849 Renewal 6		\$ -	\$ (3,802.57)	\$ 30,625.95
				\$ -	\$ 0.00	\$ 30,625.95
				\$ -	\$ 0.00	\$ -
			\$ 30,625.95	0.00	01/00/00	\$ 30,625.95
5/3/2022		Escrow Received		\$ 9,081.90	\$ -	\$ 39,707.85
5/4/2022	66295	66295 Acknowledgements		\$ -	\$ (65.76)	\$ 39,642.09
5/5/2022	64855	64855 05.22 Appeal		\$ -	\$ (4,552.37)	\$ 35,089.72
5/11/2022	66678	66678 Acknowledgements		\$ -	\$ (105.17)	\$ 34,984.55
5/11/2022	64849	64849 Renewal 6		\$ -	\$ (681.72)	\$ 34,302.83
5/11/2022	66933	66933 Acknowledgements		\$ -	\$ (148.28)	\$ 34,154.55
5/11/2022	64845	64845 Spring 2021 Newsletter		\$ -	\$ (1,684.18)	\$ 32,470.37
5/14/2022	64850	64850 Renewal 7		\$ -	\$ (3,044.75)	\$ 29,425.63
5/17/2022		Escrow Received		\$ 16,221.01	\$ -	\$ 45,646.63
5/18/2022	64843	64843 04.22 Acquisition		\$ -	\$ (2,704.00)	\$ 42,942.63
5/25/2022	64855	64855 05.22 Appeal - Postage credit		\$ 202.50	\$ -	\$ 43,145.13
5/25/2022	64856	64856 6.22 Appeal		\$ -	\$ (1,912.23)	\$ 41,232.90
5/25/2022	64855	64855 05.22 Appeal		\$ -	\$ (2,574.95)	\$ 38,657.96
				\$ -	\$ 0.00	\$ 38,657.96
Balance as of 5.31.2022						\$ 38,657.96

CASE STUDY



The Situation

With a fragmented legacy program in place, the American Cancer Society (ACS) was unable to deliver a customized donor experience. Each donor was treated the same as the current process inhibited ACS from segmenting treatments to align with their desired strategy. Additionally, based on feedback from their donors, ACS needed a way to turn around their acknowledgments and tribute card communications in a timelier manner. In some cases, a donor may not have received a "thank you" correspondence for up to four weeks after their donation. It was clear that process improvements were needed. ACS was investigating mailing on a daily basis but needed a solution that was cost-effective, quick turn, and still allowed for in-house QA review.

The Solution

A task force was assembled that included representation from multiple groups at ACS (Acquisition, Housefile, Events, and IT). The Production Solutions team worked collaboratively with ACS to develop a workflow incorporating the entire acknowledgments process. This workflow involved the internal data handling needed, quality control steps required, estimated production schedule, and the average USPS delivery time. The outcome was a fully automated process initiated by the ACS team in sweeping data daily for both their acknowledgments and tribute card mailings.

PS demonstrated its data processing capabilities by creating a comprehensive custom program that utilizes ACS source codes to digitally manufacture the acknowledgments in a single package format. This program enabled ACS to speak to their donors on multiple levels with both personalized copy and images. The ACS team can now make an ask or turn a reply slip into a program information insert – meaning if a major gift was just made or someone had just recently donated to an acknowledgment, the donor would only be thanked and not solicited for another gift.

The Results

A custom file preview was brought to the table for proofing the tribute cards, allowing ACS to ensure clean data. By processing files 3x per week and bringing a commingle solution to the table, ACS cut two weeks off in-home dates to their donors! Moreover, ACS realized a decrease in cost per piece coupled with an increase of over 4% in year-over-year revenue.

Most importantly, by adopting this new workflow and program through the help of Production Solutions, ACS is now able to fully control the donor experience. With the ability to include custom messaging and control by campaign, time of year, giving level, and source, each donor truly gets a personalized experience.

Full control of the donor experience

4% Revenue Increase
(Year-Over-Year)

703.734.5700
PRODUCTIONSOLUTIONS.COM



THANK YOU!

