

# LIFEWISE ACADEMY



## SUPPORT CENTER FEES / EXPLANATION OF SERVICES

### “Local Dollars”

You may often get the question, “How much of my donation will *stay local*?” Below is a fee schedule that may aid in articulating your response in more detail, but we recommend answering this question with something like the following:

The LifeWise Support Center provides donation management, contact management, payroll, insurance, curriculum, and a few dozen other things that a program would pay for if it operated independently. If viewed in this manner, 100% of the local funding “stays local” because the expenses are paid to accomplish the local work. In fact, you may say **more** than 100% stays local because the services are provided well below the market rate for comparable services. However, the calculations of Support Center fees are split between two scaling costs associated with donation volume and student enrollment. While the actual rate varies by program, the total average Support Center fee for these services is **about 9%** of all donations.

### Launch Fees (One Time per program)

- 1. Step 3 Fee - \$500**
  - ◆ To help offset our resource engagement costs associated with supporting the launch efforts
  - ◆ To demonstrate a commitment from the community to move forward in a meaningful way
- 2. Step 7 Fee - \$1000**
  - ◆ To help offset our resource engagement costs (process coaching and assistance) associated with supporting the launch efforts in steps 4 through 7
- 3. Go Live Fee - \$1500**
  - ◆ To help offset our resource engagement costs (leadership training, teacher training, bootcamp, etc.) associated with supporting the launch efforts in steps 8 through Live
  - ◆ Includes the minimum required LifeWise signage for classrooms (estimate value of \$300)
  - ◆ Includes two registrations to the Annual LifeWise Summit

## Student Fees - \$20 per student per year

- ◆ \$20 per unique student attended
- ◆ \$1,000 Min (floor) / Year per Program (i.e., 50 student equivalent)
- ◆ \$12,000 Max (ceiling) / Year per Program - up to 5 schools (i.e., 600 student equivalent)
  - ◇ \$1,000 increase to the max per additional school beyond the first 5 schools served

### 1. Foundational Documents

- ◆ Statement of Faith
- ◆ Vision Statement and Philosophy
- ◆ Core Values
- ◆ Program, Teacher and Volunteer Handbooks
- ◆ Policy Manual

### 2. Training/Coaching

- ◆ Program Director Bootcamp
- ◆ Leadership Board Training Courses
- ◆ Teacher Training:
  - ◇ Teacher Certification Process
  - ◇ Regional meet-ups
  - ◇ Teacher's lounge calls
  - ◇ Monthly teacher newsletter
  - ◇ Dedicated landing site for online teacher resources
- ◆ Fundraising strategies, templates and collateral
- ◆ Annual LifeWise Summit Access
- ◆ Ongoing Program Coaching
- ◆ Online Resource Hub
  - ◇ Hundreds of articles and resources for running a successful program
- ◆ Support Ticketing System
  - ◇ A team of support personnel and short response times
- ◆ Leader idea-sharing calls and forums
  - ◇ Opportunities to share tips and best practices online and in-person

### 3. Marketing

- ◆ Brand name and reputation
  - ◇ Widespread trust based on experience and evidence of impact
- ◆ Social media
  - ◇ Inclusion in national brand, social media tools, stock images, storytelling guidance
  - ◇ 52 weeks + of recommended content, images and engagement ideas
- ◆ Ready-to-use videos, brochures, etc.
- ◆ Dedicated program webpage
- ◆ Editable collateral templates for print, email newsletters and social media content
- ◆ Custom design support services
  - ◇ Design feedback and/or custom materials provided on request
- ◆ On-demand Storefront
  - ◇ Print, apparel and promotional items available online

#### 4. Curriculum

- ◆ Digital, print-ready teacher lesson guides, student activity pages and take-home materials for elementary and middle school curricula
- ◆ Elementary lesson videos
- ◆ 1-5-year flexible elementary curriculum path recommendations

#### 5. IT

- ◆ Donor Relationship Management tools (Salesforce)
- ◆ Customized, web-based platform
- ◆ Volunteer Management tools - Tools to help systematically vet and schedule volunteers
- ◆ Integrated and collaborative Google Workspace access
- ◆ Mobile App based tools and resources

#### 6. HR

- ◆ Onboarding - Offer letters and Policy Acknowledgement/Administration
- ◆ I-9 Management, Withholding and Tax Elections
- ◆ Payroll - Monthly (soon to be twice monthly) payroll auditing and processing
- ◆ Benefit management
  - ◇ Medical, Dental, Vision, AD&D, Dependent Care FSA, HSA and company match
- ◆ Retirement benefit management - 403b and Safe Harbour company match
- ◆ Background checks and renewals

#### 7. Legal

- ◆ Compliance oversight
  - ◇ Maintaining and enforcing standards to ensure every program functions legally
- ◆ Representation - Legal fees (as it relates to the insurance benefit)
- ◆ Contract administration
- ◆ 501(c)3 status, tax-exempt as a non-profit organization
- ◆ Regularly updated policies and necessary paperwork filed with the IRS

#### 8. Insurance

- ◆ Liability coverage premiums
- ◆ Vehicle and personal property coverage management

## Donation Processing & Finance Fee - 4% of all Donations

1. **Expense management (Divvy)**
  - ◆ Credit Cards
  - ◆ Dispute handling support
  - ◆ Accounting integration
  
2. **Accounts Payable**
  - ◆ Centralized request process for payment of invoices, contractors, transfers, etc.
  - ◆ Bill.com ACH and Live check services
  - ◆ Bank ACH & Wire services
  - ◆ Fraud prevention service fees (Check and ACH Positive Pay)
  
3. **Accounting**
  - ◆ Forms and procedures for proper record keeping
  - ◆ Monthly Reporting package
  - ◆ Support ticket research and issue resolution
  
4. **Donation Processing**
  - ◆ Online Donation capabilities
  - ◆ Merchant Interchange Fees for CC and ACH
  - ◆ Live Check Handling
    - ◇ Forwarding and Postage (for checks mistakenly mailed to Hilliard)
    - ◇ Lockbox Bank Imaging Service Fees
    - ◇ Support Center lockbox processing
    - ◇ Research and reconciliation
    - ◇ CRM updates - status and deposit date updates
    - ◇ Issue resolution