



# CHATBOT INSIGHTS

## SCOPE OF WORK

Prepared for



# PROJECT OVERVIEW

The Greater Hartford Arts Council (GHAC) is a cornerstone of the region's cultural vitality, serving as the primary organization dedicated to capacity-building for artists and arts organizations. As a convener, funder, and advocate, GHAC strengthens the arts ecosystem by providing direct financial support, fostering collaboration, and ensuring that creativity remains an essential part of the Greater Hartford identity. Through these efforts, GHAC amplifies artistic voices, connects communities, and drives regional cultural investment.

As donor behaviors shift and digital engagement becomes central to philanthropy, GHAC seeks new, innovative ways to cultivate deeper relationships with supporters, understand donor motivations, and refine fundraising strategies. This project introduces an interactive chatbot-driven donor engagement initiative, designed to enhance donor insights, personalize engagement, and increase fundraising success.

Through this initiative, GHAC will:

- Engage donors in meaningful, interactive conversations that strengthen relationships and encourage long-term support.
- Uncover critical donor insights to inform data-driven fundraising decisions and audience segmentation.
- Develop targeted donor personas to tailor messaging, outreach, and engagement strategies.
- Enhance storytelling and impact communication by integrating GHAC's mission and programming into donor interactions.
- Expand donor participation and giving potential by testing multi-channel outreach strategies that meet donors where they are.

This project includes two chatbot deployments:

- Chatbot 1: Donor Discovery Bot – Identifies, segments, and maps GHAC's donor landscape, providing a comprehensive understanding of donor behaviors, motivations, and intent.
- Chatbot 2 (Prelim. Recommendation): Engagement & Activation Bot – Targets identified donor segments for deeper engagement and activation. GHAC may opt for one or both pathways:
  - High-Value Donors (\$25K+ segment) – Tailored engagement strategies to cultivate and retain major donors.
  - Small-Dollar, Grassroots Donors – Expanding GHAC's donor base through scalable small-gift campaigns.

GHAC is structured for a two-chatbot engagement model, with the flexibility to refine its approach, confirm the most strategic pathway for Chatbot 2, or reassess its next steps based on funding and engagement insights. GHAC will have the flexibility to select one or both Chatbot 2 pathways, with a discounted rate for implementing both simultaneously. If GHAC defers a Chatbot 2 launch, the full price will apply to future activations. This phased implementation approach ensures that GHAC can test, iterate, and refine its donor engagement strategy based on qualitative insights, creating a scalable, data-driven framework for long-term fundraising success.



# GHAC OBJECTIVES

This initiative is designed to provide GHAC with a structured, data-driven approach to donor engagement. Through two chatbot-driven interactions, the project will:

- Uncover and define donor personas – Identifying high-value donors, small-dollar donors, and key motivations behind their support.
- Segment donors based on likelihood and impact – Using behavioral insights to determine where GHAC's outreach efforts can be most effective.
- Enhance storytelling and donor communication – Ensuring GHAC's mission resonates with potential supporters through personalized interactions.
- Optimize donor engagement strategies – Testing new outreach methods to improve fundraising effectiveness.
- Provide clear data-driven recommendations – Offering actionable insights to refine GHAC's fundraising approach for long-term sustainability.

# FINAL DELIVERABLES

This project will follow a structured, four-stage implementation process designed to maximize learning, donor engagement, and actionable insight. Each chatbot experience will be developed iteratively, allowing the team to refine engagement strategies based on qualitative donor feedback and behavioral trends. The deliverables outlined below reflect the key milestones and outputs associated with each stage.

## Stage 1: Discovery

- Discovery Brief & Outline summarizing stakeholder workshop outcomes, including initial donor personas and engagement pathways.
- Draft framework of chatbot survey questions and donor outreach strategy, provided in table format for internal reference.

## Stage 2: Chatbot Development

- Finalized chatbot script and logic framework, delivered in a structured table for GHAC reference and approval.
- Data environment setup for donor engagement tracking, with permissions-based reporting access granted to GHAC (proprietary backend remains with Company).
- Integration guidance document outlining best practices for embedding the chatbot across GHAC-owned digital channels (email, web, and social).

## Stage 3: Deployment & Engagement

- Launch of live chatbot
- GHAC access to campaign engagement data via static reports or dashboard (format TBD based on technical scope and TBD duration of campaign).

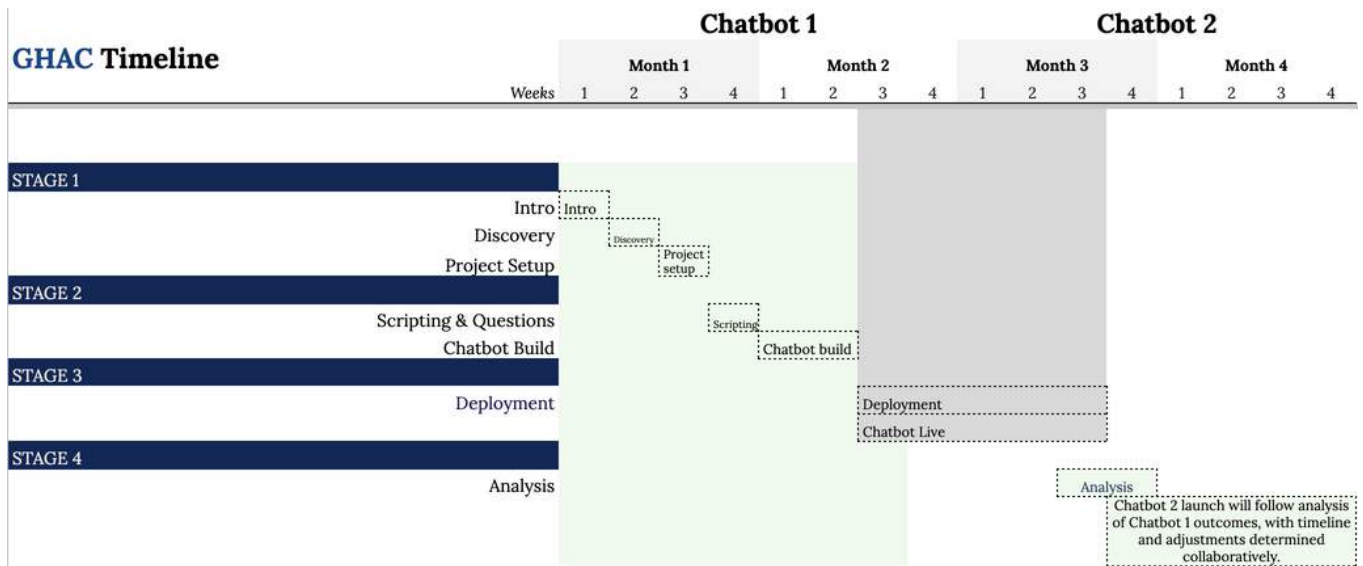
## Stage 4: Analysis & Strategic Recommendations

- Final donor insights report summarizing behavioral trends and chatbot responses (includes select visualized data results containing charts or visualizations aligned with GHAC's reporting needs).
- Strategic summary outlining potential donor engagement pathways and outreach ideas informed by chatbot findings. (\*\* These 2 bullets may be combined into one document \*\*)
- One-time post-project debrief session with GHAC stakeholders to discuss insights and explore future direction/campaigns.

While this engagement anticipates a potential second chatbot, GHAC may opt not to proceed with Chatbot 2 based on funding or strategic alignment. If so, the parties may engage in a separate discussion to explore alternative donor engagement strategies within available resources.

# PROJECT TIMELINE & PHASES

## TIMELINE



Timeline may vary and is subject to change after commencement of the Discovery Workshop.

## Chatbot 1 Donor Discovery Bot

Phase	Deliverables	Timeline
Stage 1: Discovery	2-hour stakeholder workshop, strategic alignment, donor persona framework, question outline, and Discovery Brief	1 Week
Stage 2: Chatbot build	Final chatbot script and logic framework, donor engagement strategy alignment, and data environment setup	1-2 Weeks
Stage 3: Deployment	Launch chatbot experience, monitor engagement, provide mid-campaign support and optimization memo	TBD
Stage 4: Analysis	Donor insights report with persona segmentation, visual data dashboard, strategic recommendations, and final debrief	1-2 Weeks

Timeline may vary and is subject to change after commencement of the Discovery Workshop. The chatbot may remain live for a customized period, but scope and cost may scale based on total participant volume and analysis needs. The analysis scope covers up to 2,000 participant responses. If engagement exceeds 2,000 responses, the Company and GHAC will renegotiate the scope, timeline, and costs associated with additional analysis. Video responses (if mutually agreed to include) may require an amended scope of work and estimate. If the volume of video responses surpasses a manageable threshold, additional AI-assisted processing and/or human-led analysis may be required and scoped separately.

# PROJECT **TIMELINE & PHASES** (CONT'D)

## Chatbot 2 Strategic Next Steps (Post-Chatbot 1 Decision)

This phase will be initiated only if GHAC elects to move forward following the completion of Chatbot 1. Based on donor insights and engagement outcomes, Chatbot 2 will build on what was learned to deliver a more targeted experience to refined donor segments. The stages below outline a continuation of the same structured approach.

Phase	Deliverables	Timeline
Stage 1: Post-Chatbot 1 Review & Planning	<ul style="list-style-type: none"> <li>– Analyze insights and segmentation from Chatbot 1</li> <li>– Determine strategic priorities and scope for Chatbot 2</li> <li>– Confirm audience selection and messaging direction</li> </ul>	1 week after Chatbot 1 completion
Stage 2: Chatbot 2 Development (If Confirmed)	<ul style="list-style-type: none"> <li>– Adapt chatbot logic and framework based on Chatbot 1 results</li> <li>– Customize messaging for selected donor audience(s)</li> <li>– Configure engagement settings and deployment plan</li> </ul>	TBD – Based on GHAC Decision
Stage 3: Deployment	<ul style="list-style-type: none"> <li>– Launch Chatbot 2 to refined donor segments</li> <li>– Monitor response patterns and performance</li> <li>– Implement light optimization where feasible</li> </ul>	TBD – Based on GHAC Decision
Stage 4: Analysis & Strategic Recommendations	<ul style="list-style-type: none"> <li>– Compile final engagement and behavioral insights</li> <li>– Deliver summary report with strategic guidance for long-term donor engagement</li> </ul>	TBD – Based on GHAC Decision

Timeline may vary and is subject to change after commencement of the Discovery Workshop. The chatbot may remain live for a customized period, but scope and cost may scale based on total participant volume and analysis needs. The analysis scope covers up to 2,000 participant responses. If engagement exceeds 2,000 responses, the Company and GHAC will renegotiate the scope, timeline, and costs associated with additional analysis. Video responses (if mutually agreed to include) may require an amended scope of work and estimate. If the volume of video responses surpasses a manageable threshold, additional AI-assisted processing and/or human-led analysis may be required and scoped separately.





# PRICING & PHASES

## PHASE ONE

Chatbot	Stage	Price
Chatbot 1: Donor Discovery Bot (Required Base Commitment)	Stage 1: Discovery	\$2,489.20
	Stage 2: Chatbot build	\$6,828.5
	Stage 3: Deployment	\$1,116.00
	Stage 4: Analysis	\$4,216.50
	<b>Chatbot 1 total</b>	<b>\$14,650.20</b>
50% of Chatbot 1 total due at signing (\$7,325.10). The remaining balance is due upon final delivery of all contracted Chatbot 1 deliverables.		

## PHASE TWO (OPTIONS)

Chatbot 2: Engagement & Activation Bot (Committed Upfront, Pathway Selection After Chatbot 1)	Estimated Price Range Per Option <small>Final pricing will be confirmed in a separate addendum once pathway(s) are selected.</small>
Option 1: High-Value Donor Engagement	(approx. range) \$9,500 - \$18,500
Option 2: Small-Dollar Donor Engagement	(approx. range) \$8,250 - \$11,500
Option 3: Both Options Together (15% Discount)	TBD

GHAC is structured for a two-chatbot engagement model. Following the completion of Chatbot 1, GHAC may refine its strategy, select the most impactful pathway for Chatbot 2, or reassess next steps based on funding and engagement outcomes. If both Chatbot 2 pathways are selected, a 15% discount will be applied. If Chatbot 2 is initiated at a later date (rather than concurrently), full pricing applies. Should budget constraints or strategic shifts arise post-Chatbot 1, the Company will collaborate with GHAC to explore alternative donor engagement solutions within scope.

# TERMS & CONDITIONS

## 1. Services Agreement

This Services Agreement (the “Agreement”) is entered into by and between PIXELLAB Photography & Design, LLC (“Company”) and Greater Hartford Arts Council (“Client” or “GHAC”). This Agreement shall become effective upon the date it is signed by both parties (“Effective Date”) and shall govern the scope, ownership, responsibilities, payment terms, and legal obligations of both parties.

## 2. Client Responsibilities

To ensure timely and successful completion of the Services, Client agrees to:

- (a) Provide funding, access to key personnel, and program oversight as described in the Scope of Work.
- (b) Secure all internal approvals and ensure compliance with data and communications protocols prior to chatbot deployment.
- (c) Deliver timely and accurate information, assets, and content required for execution.
- (d) Respond to requests, feedback loops, and approvals within five (5) business days unless otherwise agreed in writing.
- (e) Appoint a primary point of contact to streamline decision-making and feedback coordination.
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Failure to meet these responsibilities may result in project delays or revised delivery timelines.

## 3. Acceptance of Deliverables

- (a) All Deliverables include up to two (2) rounds of revisions, with Client feedback due within five (5) business days of receipt.
- (b) Additional revision cycles, scope changes, or excessive delays in approval may require a change order and result in additional fees.
- (c) If Client does not provide written notice of material rejection of a Deliverable within five (5) business days, it will be considered accepted.
- (d) All Change Orders must be agreed upon in writing and signed by both parties prior to implementation.
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## 4. Fees & Payment Terms

### 4.1 Fees & Invoicing

Client agrees to pay all fees in accordance with this Agreement and the attached Scope of Work.

- For fixed-fee projects, the payment schedule is outlined in the Deliverables and Timeline section.
- For additional or ongoing services, the Company will invoice monthly in arrears.
- If GHAC elects to proceed with Chatbot 2 or future chatbot extensions, corresponding fees will be invoiced upon selection of preferred pathways, with final payment due upon delivery.

### 4.2 Late Payments

Invoices not paid within thirty (30) days of issuance shall incur a 2.5% monthly late fee on the outstanding balance unless otherwise agreed in writing.

### 4.3 Expenses

Client agrees to reimburse the Company for any pre-approved expenses required for project execution, including third-party software, hosting, or subcontractor costs. No travel or in-person costs shall be incurred without prior written approval or unless specified in the Scope of Work.

### 4.4 Taxes

Client shall be responsible for any applicable sales, use, or other taxes (excluding the Company’s income taxes) associated with services rendered under this Agreement.



# TERMS & **CONDITIONS** (CONT'D)

## 4.5 Disputed Fees

If Client disputes any portion of an invoice, it must notify the Company in writing within seven (7) business days of receipt. All undisputed charges must be paid in full by the due date. Non-payment of undisputed fees may result in suspension of services.

## 5. Ownership, Data Use & Legal Protections

### 5.1 Intellectual Property & Licensing

The Company retains full ownership of all chatbot architecture, design systems, branching logic, scripting, and backend infrastructure (collectively, the “Chatbot Infrastructure”) developed during the course of this engagement. This intellectual property is proprietary to the Company.

The Client is granted a non-exclusive, non-transferable license to use the chatbot developed for this project for the purposes outlined in the Scope of Work, including:

- Donor engagement and education
- Public storytelling and outreach
- Strategic planning and program improvement

This license applies only to the specific chatbot instance deployed as part of this Agreement. Future use, cloning, or redeployment may require additional licensing terms or support agreements.

Client retains ownership of all:

- Donor response data collected via the chatbot
- Client-authored materials and media
- Brand assets and messaging provided for integration

### 5.2 Data Use & Privacy

All donor or participant data collected through the chatbot belongs to the Client. The Company will not sell, share, store, or use this data for any purposes beyond what is required for execution of the project. Contact information or sensitive submissions will be securely transmitted to the Client and deleted from the Company’s systems upon project closeout.

The Company may retain anonymized, non-identifiable metadata or response patterns to improve its design methodology, unless explicitly restricted by the Client.

If participants voluntarily disclose personally identifiable information (PII) during chatbot use, such information will be treated as confidential and will not be published, quoted, or reused outside the Client’s internal analysis or approved reporting.

### 5.3 Consent & Participant Protection

All chatbot experiences include a plain-language disclosure describing data collection and usage. Participation is optional. If applicable, consent protocols and user agreements will be reviewed and approved in advance by the Client.

The Client is responsible for ensuring that its data collection and donor communication practices comply with any applicable regulations or internal governance policies.

### 5.4 Confidentiality

Each party agrees to keep all non-public materials, donor insights, designs, and strategy-related information confidential. This includes all media, reports, dashboards, and chat transcripts unless otherwise agreed in writing. Confidentiality survives termination of this Agreement.

## TERMS & **CONDITIONS** (CONT'D)

### 5.5 Data Breach & Security Protocol

The Company will notify the Client within seventy-two (72) hours of any suspected breach or unauthorized access to chatbot content or participant data. All known impacts and remedial actions will be documented, and the Company will cooperate with the Client to meet any legal or reputational obligations.

### 5.6 Hosting, Access & Future Use

Unless otherwise specified in the Scope of Work, chatbot hosting will remain the responsibility of the Company. If long-term hosting or third-party transfer is desired, the parties may negotiate a hosting or licensing extension.

The Client may not redeploy, clone, modify, or relicense the chatbot without prior written approval from the Company.

### 5.7 Attribution & Publicity

The Client may share publicly that this project was completed in collaboration with PIXELLAB. The Company may reference this work in future case studies or portfolio materials, provided that no donor PII or sensitive findings are disclosed without written permission.


### 5.8 Termination

Either party may terminate this Agreement with ten (10) days' written notice. Upon termination, the Client agrees to pay for all work completed up to the termination date, including any outstanding revision rounds or deliverables already in production.

### 5.9 Entire Agreement

This Agreement, including the Scope of Work and any exhibits or addenda, constitutes the full and complete understanding between the parties. No oral statements or prior agreements shall have legal effect unless expressly incorporated in writing. Amendments must be signed by both parties.

## PROPOSAL **APPROVAL**

Approver	Title/Company	Signature	Approval Date
<b>Amanda Roy</b>	CEO, Greater Hartford Arts Council		
<b>Aaron Lyles</b>	Exec. Dir., PIXELLAB		04/24/2025

# INVOICE

AL\_GHAC\_001

Prepared for



## BILLED TO CLIENT:

Greater Hartford Arts Council  
100 Pearl St, Hartford, CT 06103  
ARoy@letsgoarts.org

## PROJECT:

GHAC Donor Insights Chatbot Survey

**INVOICE NUMBER:** AL\_CHAC\_001

**DATE ISSUED:** 03/25/2025

## Description

## Qty

## Price

## Total

Initial Setup Fee (due at signing)

01

\$7,325.10

\$7,325.10

Balance (due upon final delivery)

01

\$7,325.10

\$7,325.10

Project Total

\$14,650.20

**Total Due Today**

**\$7,325.10**



## WIRING INSTRUCTIONS

Account. name:  
PIXELLAB Photography & Design, LLC

Company Address:  
1984 Albany Ave., West Hartford, CT 06117  
(310) 663-5553  
alyes15@gmail.com

Account #: 336289209  
Bank: JP Morgan Chase Bank, N.A  
Bank address: N.A PO Box 182051,  
Columbus, OH, 43218-2051  
Routing/APA #: 322271627  
EIN: 464675404

**THANK YOU!**

Let's create something special together!

**THANK YOU**

