



### 1 BRIEF OVERVIEW

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RNL's On-Site Calling is a tailored calling program that includes advanced reporting and tracking, calling software, and program management. On-Site Calling is defined as a calling program with the call center located on Client's campus.

### 2 ON-SITE CALLING: CONSULTATION SERVICES

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If Client's Synergy program includes On-Site Calling, Client may have access to the following consultation services during the Term in quantities to be determined by RNL in conjunction with the Client, pursuant to an executed RNL Synergy SOW ("**Services**"):

#### A. Data Enrichment:

- i. **NCOA (National Change of Address):** A data enrichment service utilizing address information provided by the US Postal Service.
- ii. **Phone Append:** A data enrichment service conducted on specific constituent attributes provided by the Client to apply new phone numbers for Client-provided constituent data.
- iii. **Wireless ID:** A data enrichment service that verifies if an existing prospect phone number (based on the first seven digits of the 10-digit phone number or the prefix plus one) is a landline, wireless, or a ported wireless number.
- iv. **Cell Append:** A data enrichment service to match on specific constituent attributes to apply a wireless phone number.
- v. **Email Verification:** A data enrichment service intended to identify valid email addresses.
- vi. **Email Append:** A data enrichment service intended to find email addresses for prospects.
- vii. **Line Status:** A data enrichment service that queries the phone system network to find out if a phone number is in service.
- viii. **Advanced Analytics:** RNL's proprietary predictive modeling solution to identify which prospects are most likely to make a donation.

#### B. Data Management

- i. **Segments:** Grouping of past donors and donor prospects by one or more common attributes.
- ii. **Loads:** The process of transferring Client's data onto equipment.
- iii. **Email Reminder Drops:** An electronic file containing prospects who have made outstanding pledges and who are scheduled to receive either a reminder letter or email, or both.
- iv. **Paid & Deletes:**

- a. **Paids:** Processing of Client files for prospects who fulfilled a gift made through the calling program in order to remove them from further fulfillment messages.
- b. **Deletes:** Processing of Client files for prospects that have requested not to be contacted via a certain channel, channels, or through any communication type in order to remove them from further communications via the requested restricted channels.
- v. **Demo Refreshers:** The process of updating a data set that has been loaded onto RNL equipment with demographic information received from a Client.

## C. Software

### i. **Engagement Center Station Software:**

- a. **RNL Engage:** RNL's proprietary, Internet-accessible advancement software designed to support an organization's telephone-based engagement and fundraising program, as well as associated user interfaces and related technology. 24 hours/day, 7 days/week helpdesk support is available for questions about RNL Engage and its use.
  - 1. Includes commercially reasonable level of assistance with and guidance on the following to support Client's use of Software:
    - Loading data;
    - Creating segments and engagement pools;
    - Creating email responses; and
    - Performing system backups.
  - b. **HEP:** Database software integrated into RNL Engage to provide employer matching gift information, so long as it is available to RNL during the Term, at RNL's discretion.
  - c. **OGI (Online Giving Integration):** An integrated RNL pass-through solution to enable Client Ambassadors to enter payment card information directly into the Client-supplied online giving page.
- ii. **AL: Conversational AI for FM:** An online chatbot that can be trained to have up to twenty-five (25) specific conversations and includes the following:
  - a. RNL will provide up to three (3) hours of initial training via webinar to include chatbot set-up, conversations, and conversation management post-launch; and
  - b. Client may utilize and train chatbot for use on Client's website(s).
- iii. **RNL Visual Caller ID:** Enables caller ID information to appear on recipients screen as Client's name, logo, and location.
- iv. **Automated Voicemail:** Digital voicemail on an RNL VOIP phone line.

## D. Program Support and Consulting

- i. **Engagement Center Manager:** An individual RNL employee assigned to provide on-site engagement center support. Responsibilities include: helps recruit, interview, and train Ambassadors; manages call sessions; and tracks program and Ambassador statistics.

Hours of Engagement Center Management is 1 p.m. to 9 p.m., unless otherwise agreed to in writing by Client and RNL.

- ii. **Program Strategy and Management:** Consulting on the Client's fundraising strategy and plan based on engagement center capacity and scope of Services pursuant to this SOW.
- iii. **Site Visit:** A visit to the Client's campus remotely or in person to facilitate delivery of Services, including consulting, training, and/or delivering report reviews.
- iv. **RNL 360:** A high-level analysis of historic giving behaviors and trends.
- v. **Program Reporting:** Delivery of RNL standard reports, as determined by RNL, which may include:
  - a. **Standard Bi-Weekly Deletes** – Client file of records to be removed from the scope of Services and which will receive no further contact (phone, mail, or email).
  - b. **Standard Bi-Weekly Paid**s – Client file of "paid"/donors which may be used to generate regular reminder outreach for an RNL-managed fulfillment plan and monthly fulfillment report.
  - c. **Standard PDF/Daily File Package** – Daily suite of reports including pledge report, change report, comment report, phone completes, and matching gift report.

### 3 ON-SITE CALLING: SOLICITATION SERVICES

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If Client's Synergy program includes On-Site Calling and RNL is paying Caller wages, then the following solicitation services are included:

- A. Solicitation of donations including:
  - i. RNL will recruit, hire, employ, compensate, and provide certain benefits to engagement center ambassadors ("**Ambassadors**") to conduct Engagement.
    - a. "**Engagement**" includes all time spent by Ambassadors, trainers, and supervisors at the engagement center working in any manner on Client-related fundraising and stewardship efforts and activities.
  - ii. RNL will give preference and priority to Client's students when recruiting and hiring Ambassadors.
  - iii. RNL will recruit, hire, employ, compensate, and provide certain benefits to an engagement center supervisor, who will participate in the hiring, training, and oversight of Ambassadors in collaboration with the Engagement Center Manager, assist Ambassadors in their efforts, gather data for the Client, and provide goal setting and coaching for Ambassadors
  - iv. RNL will train Ambassadors to solicit pledges and donations for Client.
  - v. Ambassadors may accept donations made by payment card. Client and RNL will work together to determine a mutually agreeable method for accepting such donations
- B. RNL will provide the networking, cabling, management, and operation of the equipment within the switch closet and server room/RNL provided cabinet, as well as stations within the Client engagement center, and will do so with a design which has been subject to an annual PCI DSS assessment. RNL does not provide payment card storage or processing services, is not required to store or process cardholder data on behalf of the Client, and is not involved in the storage or

processing of cardholder data, pursuant to this SOW. Client shall not use the stations for any purposes other than as necessary for the Services (e.g., shall not be used for Client resource training or emergency services).

- C. Contingent on satisfaction of Client Responsibilities, RNL will configure the online giving interface at the Client engagement center to securely connect the engagement center stations to an online giving page supplied by Client, to enable Client Ambassadors to enter payment card information directly into the supplied online giving page.
- D. RNL will implement a secure VPN connection from the Client engagement center to RNL.
- E. RNL will provide access to Engagement Center Station Software at engagement center stations (referred to as the Named Users).

## 4 CLIENT RESPONSIBILITIES

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- A. The provision of Services by RNL is conditioned upon Client providing the following (“**Client Responsibilities**”):
  - i. Caller ID information about Client for use with outbound calls.
  - ii. Email address to be used for outbound messages and replies.
  - iii. An online giving website through which donations may be made by credit card, using an approved RNL payment processor vendor retained and paid for by Client.
  - iv. Installation, implementation, and utilization of RNL’s engagement center network configuration requirements, as instructed by RNL.
  - v. Client hereby agrees to the RNL Standard Application Service Provider Terms and Conditions found at [ruffalonl.com/documentation](http://ruffalonl.com/documentation), for the Engagement Center Station Software and any Crowdfunding subscriptions pursuant to this SOW.
  - vi. If applicable, an engagement center appropriate for the Services.
  - vii. If applicable, written confirmations to all individuals who make a pledge as a result of services provided by RNL, including production and delivery in accordance with the law, if Client is sending such confirmations.
- B. If Client’s Synergy program includes On-Site Calling and the Client is paying Caller wages, then the additional Client Responsibilities apply:
  - i. Hiring, employment, compensation, recruitment assistance, and benefits of individuals calling on Client’s behalf.
- C. If Client’s Synergy program includes On-Site Calling and RNL is paying Caller wages, then the additional Client Responsibilities apply:
  - i. A commercially reasonable level of assistance and support for the recruitment of Callers, including, but not limited to, locations on campus for posting open positions.
  - ii. All pricing is subject to adjustment based on any increase in any applicable minimum wage law, regulation, or policy, including without limitation: federal, state, provincial, and local laws, as well as Client policies or procedures applicable to wages (individually a “**Required Wage Increase**”). In the event of a Required Wage Increase, RNL may increase

all pricing and fees based in any manner on wages, by an amount equal to the Required Wage Increase plus the reasonably estimated taxes imposed on such Required Wage Increase, in its discretion, and such increase shall be added to the total price as additional fees to be paid by Client. RNL will provide written notice of any increase.

- iii. Client shall reimburse RNL for all long distance telephone charges incurred through delivery of the Services, if the long distance services are provided by RNL ("**Long Distance Expenses**"). Long Distance Expenses, if any, will be invoiced to Client as incurred by RNL.