



1 BRIEF OVERVIEW

RNL's Off-Site Calling is a fully-managed calling program that includes consultation and strategy, data research, and optimized calling by RNL's professionally trained calling staff. Off-Site Calling is defined as a calling program at one of RNL's call center locations.

2 OFF-SITE CALLING: CONSULTATION SERVICES

If Client's Synergy program includes Off-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. **Demo Refreshers:** The process of updating a data set that has been loaded onto RNL equipment with demographic information received from a Client.

- C. Program Reporting:
- i. **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-CS.
 - ii. **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.
 - iii. **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, email bounces, email unsubscribes, and matching gift report.
 - iv. **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).
 - v. **RNL Visual Caller ID:** Enables caller ID information to appear on recipients screen as Client’s name, logo, and location.

3 OFF-SITE CALLING: SOLICITATION SERVICES

If Off-Site Calling is purchased, 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 train Ambassadors to solicit pledges and donations for Client.
 - iii. Ambassadors may accept donations made by payment card. Client and RNL will work together to determine a mutually agreeable method for accepting such donations.

4 CLIENT RESPONSIBILITIES

- 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.