



1 BRIEF OVERVIEW

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

If Client's Synergy program includes On-Site Calling, Client will 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. **Advanced Address:** A data enrichment service to find and update address information from various third party sources.
- iii. **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.
- iv. **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.
- v. **Cell Append:** A data enrichment service to match on specific constituent attributes to apply a wireless phone number.
- vi. **Email Verification:** A data enrichment service intended to identify valid email addresses.
- vii. **Email Append:** A data enrichment service intended to find email addresses for prospects.
- viii. **Employer Append:** A data enrichment service that searches for employer information of constituents, for which an email and physical address are required to complete the process.
- ix. **Automatch:** A data enrichment service that identifies matching-gift-eligible constituents based on data provided in the employer field or appended during an Employer Append.
- x. **Advanced Landline:** A data enrichment service to find and update landline telephone number information from various third party sources.
- xi. **Deceased Verification:** A data enrichment service that is intended to identify deceased individuals in the constituent data file.
- xii. **Line Status:** A data enrichment service that queries the phone system network to find out if a phone number is in service.

xiii. **Smart Target:** 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. **Paid:** 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. **Phonathon Station Software (includes RNL Engage, HEP, and OGI):**
 - 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 calling 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 callers to enter payment card information directly into the Client-supplied online giving page.
 - d. **RNL Visual Caller ID:** Enables caller ID information to appear on recipients screen as Client's name, logo, and location.

- e. **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 call center support. Responsibilities include: helps recruit, interview, and train callers; manages call sessions; and tracks program and caller 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 call 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 Pairs** – Client file of "pairs"/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

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 callers ("**Callers**") to conduct Calling.
 - a. "**Calling**" includes all time spent by Callers, trainers, and supervisors at the call center working in any manner on Client-related fundraising and stewardship efforts and activities, including without limitation: making telephone calls on behalf of Client for fundraising and stewardship; supervision of fundraising and stewardship calling; training on fundraising and stewardship; clerical hours; all registration and maintenance time of Callers, trainers, and supervisors; and all RNL Engage time of Callers, trainers, and supervisors.
 - ii. RNL will give preference and priority to Client's students when recruiting and hiring Callers.
 - iii. RNL will recruit, hire, employ, compensate, and provide certain benefits to a call center supervisor, who will participate in the hiring, training, and oversight of Callers in collaboration with the Engagement Center Manager, assist Callers in their efforts, gather data for the Client, and provide goal setting and coaching for Callers.
 - iv. RNL will train Callers to solicit pledges and donations for Client.

- v. Callers will accept donations made by payment card during Calling, and RNL will manage such acceptance, by one of the following methods, at the written direction (including by electronic mail) of Client:
 - a. By entering the donation into a website for gift processing supplied by Client;
 - b. By transferring the call during which payment card information is given to either a call center supervisor or Engagement Center Manager, who will enter the donation into a website for gift processing supplied by Client.
 - c. By Callers manually recording payment card information on a document the Caller delivers to either a call center supervisor or Engagement Center Manager, who will enter the donation into a website for gift processing supplied by Client.
- 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 call 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 call center to securely connect the phonathon stations to an online giving page supplied by Client, to enable Client callers to enter payment card information directly into the supplied online giving page.
- D. RNL will implement a secure VPN connection from the Client call center to RNL.
- E. RNL will provide access to Phonathon Station Software at calling stations (referred to as the Named Users).

4 CLIENT RESPONSIBILITIES

- A. The provision of Services by RNL is conditioned upon Client providing the following (“**Client Responsibilities**”):
 - i. A call center satisfying all of the requirements as detailed below in Section 5.
 - ii. 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.
 - iii. Installation, implementation, and utilization of RNL’s call center network configuration requirements as detailed below in Section 6 and Section 7, including, but not limited to, the network features and elements between the call center firewall and RNL.
 - iv. Client hereby agrees to the RNL Standard Application Service Provider Terms and Conditions found at ruffalonl.com/documentation, for the Phonathon Station Software and any Crowdfunding subscriptions pursuant to this SOW. Such terms may be modified by RNL at any time, and Client’s ongoing use of the Phonathon Station Software and any Crowdfunding subscriptions shall be deemed acceptance of any such modified terms.

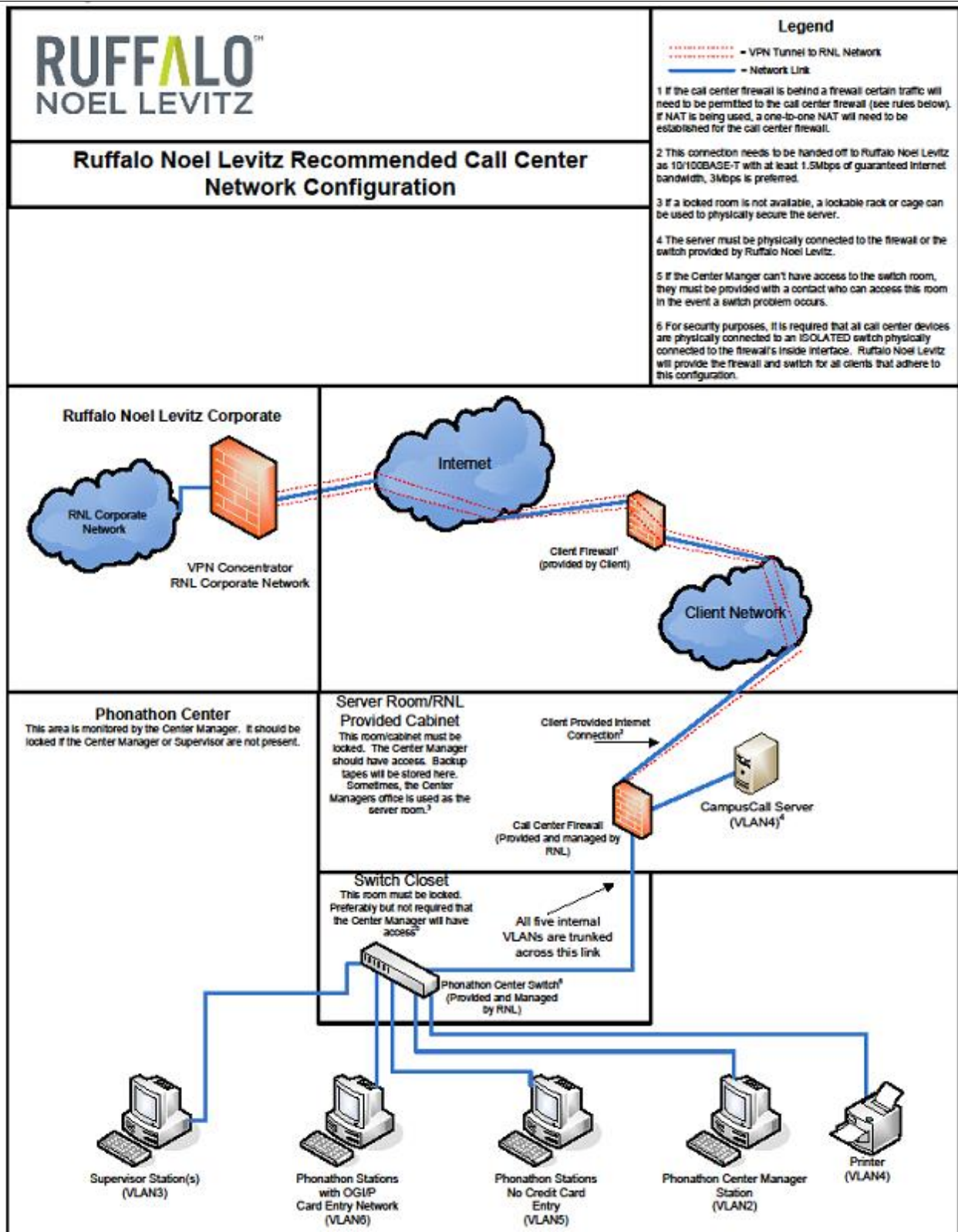
- v. If applicable, written confirmations to all individuals who make a pledge as a result of services provided by RNL, including production and delivery in accordance with the law, if Client is sending such confirmations.
- B. If Client's Synergy program includes On-Site Calling and the Client is paying 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. 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.
 - iii. Call hours are 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.
 - iv. 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.

5 ON-SITE CALLING: CALL CENTER REQUIREMENTS

- A. A dedicated, secure, and safe physical space (locked during non-calling hours) on Client's campus with at least eighty (80) square feet of private office for the Engagement Center Manager, at least 100 square feet of private conference space for meetings and training, and room for phonathon stations.
- B. Each phonathon station shall be at least seven feet (7') by four feet (4') (twenty-eight (28) square feet), equipped with at least three (3) dedicated electric outlets.
- C. Such call center space shall be available 1:00 p.m. – 11:30 p.m. each Monday through Thursday evening, 11:00 a.m. – 11:30 p.m. on Sundays, and, if recommended by RNL, on Fridays and/or Saturdays.
- D. A secure, locked room or cabinet(s) located within or near the call center shall be available for storage of equipment.
- E. A secure, locked room within or near the call center, with an Internet connection and a permanent, public Internet address, for the server.

- F. All call center furniture, including, but not limited to, a desk and chair for each phonathon station and Engagement Center Manager.
- G. Wiring in walls, electrical outlets, and approved VoIP telephone lines for each phonathon station, and surge protectors for each phonathon station.
- H. Full payment of telephone bills, including all expenses associated with telephony resulting from calling pursuant to this SOW.
- I. Parking near the call center for the Engagement Center Manager, at no cost to RNL or the Engagement Center Manager.
- J. Copier and fax service in or near the call center.
- K. Access to Client network printer, if requested by RNL.
- L. A secure disposal bin to ensure sensitive information or data captured in the phone program is disposed of properly.
- M. Security, janitorial services, electricity, heating/cooling, water/sewer, and all other occupancy expenses for the call center.

6 ON-SITE CALLING: CALL CENTER NETWORK CONFIGURATION (9- or 12-MONTH PROGRAM)



7 ON-SITE CALLING: WIRELESS CALL CENTER NETWORK CONFIGURATION (12-WEEK PROGRAM)

