RNL Synergy — Off-Site Calling

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 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.

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.

v. **Custom Caller ID**: For clients using RNL's phone system, RNL can push a client specific caller ID (number and description) that may be visible to prospects called. Individual phone carriers may limit what caller ID data is made available.

C. Program Reporting:

i. **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.

ii. **Site Visit:** A trip by the applicable RNL employee, as determined by RNL, to Client's campus, or other mutually acceptable location.

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 Paids** – Client file of "paids"/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.

iv. **RNL Visual Caller ID:** Enables caller ID information to appear on recipients screen as Client's name, logo, and location.

v. **Automated Voicemail:** Digital voicemail on an RNL VOIP phone line.

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 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 train Callers to solicit pledges and donations for Client.

iii.   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 Program 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 Program Center Manager, who will enter the donation into a website for gift processing supplied by Client.