



## 1 BRIEF OVERVIEW

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- A. RNL's Millennial Journey is designed to provide a prospect-driven engagement experience through exploration of individual interests and opportunities to allow prospects to become philanthropically connected to the Client.
- B. RNL's Leadership Journey is designed to provide a prospect-driven engagement experience through exploration of individual interests, discovery of wealth indicators, and likelihood to commit to a leadership gift.

## 2 MILLENNIAL JOURNEY SERVICES

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During the Term, Client may have access to the following Millennial Journey services in quantities to be determined by RNL in conjunction with the Client, pursuant to an executed RNL Synergy SOW ("**Services**"):

- A. Data Enrichment:
  - i. **Email Append:** A data enrichment service intended to find email addresses for prospects.
  - ii. **Email Verification:** A data enrichment service intended to identify valid email addresses.
- B. Data Management:
  - i. **Campaign Launches:** Commencement of activities pursuant to this SOW-CS designed to generate prospect driven engagement.
  - ii. **Landing Pages:** A website accessed by clicking a hyperlink.
  - iii. **Branching Survey:** An online survey with multiple questions which utilize known prospect information and may present different options or pathways based on prospects responses/activity.
  - iv. **Demographic Update Form:** Form to collect information for prospect records.
- C. Direct Marketing (includes Creative Services):
  - i. **Engagement Email Versions:** Creation of versions of an email message using design prototype templates to engage prospects.
    - a. **Engagement Email:** Non-solicitation emails sent to encourage activity by the prospect during the campaign.
  - ii. **Solicitation Email Versions:** Creation of versions of an email message using design prototype templates to encourage a donation.
    - a. **Solicitation Email:** Emails sent based on activity of the prospect in the campaign to encourage charitable giving to the client institution.
  - iii. **E-newsletters:** Creation of an email newsletter using Client-provided content built upon one (1) e-newsletter template.

- iv. **Digital Ads:** A digital advertisement designed for mobile, display, or social networks.
- v. **Digital Ad Sizes:** Dimensions of Digital Ads.
- vi. **Digital Impressions:** A single display of an Ad on a webpage, mobile app, or other delivery medium.

D. Program Support:

- i. **Program Reporting:** Delivery of RNL standard reports, as determined by RNL, which may include:
  - a. Self-service dashboard reporting with filter and drill-down capabilities; and
  - b. Prospect records with behavioral engagement scoring for select prospects provided in .csv format at select points with full report of all prospects at the end of the program.
- ii. **Behavioral Scoring:** A mathematical score that is generated based on the amount of activity/engagement the prospect has within the campaign.

### 3 LEADERSHIP JOURNEY SERVICES

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During the Term, Client may have access to the following Leadership Journey services in quantities to be determined by RNL in conjunction with the Client, pursuant to an executed RNL Synergy SOW (“Services”):

A. Data Enrichment:

- i. **Email Append:** A data enrichment service intended to find email addresses for prospects.
- ii. **Email Verification:** A data enrichment service intended to identify valid email addresses.
- iii. **NCOA (National Change of Address):** A data enrichment service utilizing address information provided by the US Postal Service.
- iv. **Cell Append:** A data enrichment service to match on specific constituent attributes to apply a wireless phone number.
- v. **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. **Campaign Launches:** Commencement of activities pursuant to this SOW-CS designed to generate prospect driven engagement.
- ii. **Branching Survey:** An online survey with multiple questions which utilize known prospect information and may present different options or pathways based on prospects responses/activity.

C. Direct Marketing (includes Creative Services):

- i. **Engagement Email Versions:** Creation of versions of an email message using design prototype templates to engage prospects.
  - a. **Engagement Email:** Non-solicitation emails sent to encourage activity by the prospect during the campaign.

- ii. **Thank-You Email Versions:** Creation of versions of an email message for the purpose of thanking donors.
  - a. **Thank-You Email:** Emails sent to thank a donor for a gift.
- iii. **Personalized Direct Mail Piece (style/design decided by RNL):** Creation of a personalized direct mail piece used to engage target prospects and encourage them to fulfill a journey activity.
- iv. **Digital Ads:** A digital advertisement designed for mobile, display, or social networks.
- v. **Digital Ad Sizes: Dimensions of Digital Ads.**
- vi. **Digital Impressions:** A single display of an Ad on a webpage, mobile app, or other delivery medium.

D. Program Support:

- i. **Program Reporting:** Delivery of RNL standard reports, as determined by RNL, which may include:
  - a. Self-service dashboard reporting with filter and drill-down capabilities; and
  - b. Prospect records with behavioral engagement scoring for select prospects provided in .csv format at select points with full report of all prospects at the end of the program.
- ii. **Behavioral Scoring:** A mathematical score that is generated based on the amount of activity/engagement the prospect has within the campaign.

## 4 CLIENT RESPONSIBILITIES

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- A. The provision of Services by RNL is conditioned upon Client providing the following (“**Client Responsibilities**”):
- i. Access to client payment processor for online gift integration via payment processor hosted order page.
  - ii. Client represents and warrants that:
    - a. It will adopt and maintain an appropriate privacy policy to which Client’s constituents will have reasonable access; and
    - b. It will only import, access, or otherwise use data for which all individuals have consented to receive correspondence (through any and all relevant methods (e.g., email, call, text)) from Client in connection with Client’s use of the Services.