



Statement of Work #16 - Applicant Cultivator

1 OVERVIEW

This Statement of Work (“SOW”) describes services to be provided by Ruffalo Noel Levitz, LLC (“RNL”) to Bowling Green State University (“Client”) (together referred to as the “Parties”) and is made pursuant to the August 31, 2015 Master Services Agreement between the Parties (“MSA,” and collectively with this SOW the “Agreement”).

2 TERM

A. The term of this SOW starts on August 1, 2019 (“Start Date”) and ends on July 31, 2020 (“End Date”) (the “Term”).

3 SERVICES

A. During the Term, RNL will provide the services described in Appendix 1 in the following quantities for up to 10,000 (ten thousand) records (“Services”):

Program Inclusions	Quantity Per Program Year
Application Marketing Campaign	
Campaign Launches	3
Outreach Email Templates	1
Outreach Email Versions (1 series of 9 emails)	9
Include Targeted Non-Responders from RNL Demand Builder	Yes
Phone Campaign Launches	3
Calling Segments	Up to 4
Dedicated Calling Hours	400
Fulfillment Email Templates	1
Fulfillment Email Versions	1
Application Information Package Templates	1
Application Information Package Versions	1
Application Information Package Volume	100% with valid address
Personalized Letter with Insert Templates	0
Personalized Letter with Insert Versions	0
Personalized Letter with Insert Volume	100% with valid address
RNL Digital Advertising Impressions	0
Display Ad Templates for Digital Advertising	0
Display Ad Versions for Digital Advertising	Up to 0
RNL Parent Engagement (6 Emails in a Series)	0
Modeling Analytics	
Search Model (4 Distinct Markets)	1
ForecastPlus™ Inquiry to Enrollment Model	0
Consulting, Reports & Support	

Campus Visits	Up to 2
Program Reporting	RNL Standard Reports
Program Management and Consulting	Included
Software	
RNL Visual Caller ID	Included

- B. RNL manages the creative process as applicable to the Services in two (2) revision rounds (“Revision Rounds”) before Client approval.
- C. All Services purchased must be consumed within the Term.

4 CLIENT RESPONSIBILITIES

- A. The provision of Services by RNL is conditioned upon Client providing the following (“Client Responsibilities”):
 - i. A data file with up to 10,000 (ten thousand) prospective applicant records, in the file format requested by RNL and in a timely manner.
 - a. If Client provides records in excess of the maximum and/or in a data file format other than RNL’s requested format, the Client will have the option to either (1) incur an additional fee corresponding to the additional work required to utilize the data file, or (2) resend the data file as requested by RNL.
 - ii. Data necessary for the analysis and research components of the Services, in the format requested by RNL and in a timely manner.
 - iii. Client Materials necessary for the Services.
 - iv. Timely coordination with RNL for implementation of Services.
 - v. Except to the extent otherwise expressly provided in this SOW or waived in writing signed by both Parties, Client shall deliver Client Materials to an RNL provided SFTP server.

5 FEES & PAYMENT SCHEDULE

- A. Client shall pay RNL \$66,500 (sixty six thousand five hundred dollars) for Services.
- B. Client shall pay for Services in accordance with the following payment schedule:

<u>Payment Due Date</u>	<u>Services Fees</u>
September 1, 2019	\$33,250
November 1, 2019	\$16,625
January 1, 2020	<u>\$16,625</u>
TOTAL	\$66,500

- C. Client shall reimburse RNL for all postage charges incurred through delivery of the Services (“Postage Fees”). RNL will bill Client for postage as it is incurred.

- D. 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.
- E. Sales tax is not included in the pricing and will be added where applicable unless an exemption certificate is provided to RNL.
- F. Client shall pay applicable vendors for fees it incurs for purchase of Search Records. RNL’s good faith estimate of such fees is \$2,000 (two thousand dollars) annually.
- G. Payment of amounts due following resolution of disputed billings and invoices, if any, are due ten (10) days following resolution.

6 CLIENT INFORMATION

A. Client primary contact for SOW:

Name: Adrea Spoon
 Title: Director of Admissions
 Phone: 419-372-7857
 Email: adrea@bgsu.edu

B. Invoices shall be sent to the following address:

Name: Christy Boggs
 Title: Sr. Admin
 Address: 200 University Hall
 City, State, Zip: Bowling Green, OH 43403
 Phone: 419-372-7804
 Email: cfboggs@bgsu.edu

Client may revise the above contact information at any time upon written notice to RNL.

7 GENERAL PROVISIONS

- A. **Amendments.** Any amendments to this SOW will require a change order (“CO”) signed by both Parties. No services are required to be rendered or provided beyond the scope of services described in this SOW, without a CO or separate SOW.
- B. **Service Conditions.** If any of the Client Responsibilities or payment obligations described

above (the “**Service Conditions**”) are not satisfied, then RNL may suspend provision of the Services and may terminate this SOW without penalty to RNL. Any decision by RNL to forego suspension or termination of this SOW in the event of an unsatisfied Service Condition shall not be construed as a waiver of RNL’s right to later terminate this SOW if the unsatisfied Service Condition remains uncured, or for any other unsatisfied Service Condition, all in RNL’s sole discretion. Notwithstanding any term in the Agreement to the contrary, this SOW may not be terminated without cause.

- C. **Other Provisions.** Any terms or phrases undefined in this SOW shall have the meaning given them in the MSA. If there is any conflict between the terms of this SOW and the MSA, the terms of the MSA shall govern and control. This SOW, the MSA, and applicable invoices (“**Relevant Documents**”) are the Parties’ entire agreement relating to the subject matter of the Relevant Documents. Any modifications to the Relevant Documents or Change Orders must be in writing, signed by both Parties, and specifically reference and this SOW. Obligations in the MSA or this SOW which by their nature are continuing, shall survive termination or expiration of the Agreement. The Parties agree that additional, conflicting, or different terms on existing or future Client or third-party purchasing documents are expressly rejected and shall be void.

**[SPACE INTENTIONALLY LEFT BLANK.
SIGNATURES FOLLOW ON NEXT PAGE.]**

Bowling Green State University

By: Adred Spoon
Printed Name: Adred Spoon
Title: Director of Admissions
Date: July 23, 19

Ruffalo Noel Levitz, LLC

By: _____
Printed Name: _____
Title: _____
Date: _____

Please return signed contracts to RNLContracts@RuffaloNL.com

Appendix 1 to SOW (Description of Services)

Definitions:

- i. **Inquiry Record:** An individual student record classified as a student who has inquired/requested/sought out information about the Client.
- ii. **Search Records:** Student records purchased by Client through a third party such as College Board, National Research Center for College and University Admissions (NRCCUA), Act, Inc., and/or College Bound Selection Service (CBSS).
- iii. **Revision Round:** A text and design change requests for any and all creative components communicated by Client to RNL, and then completed by RNL before the Campaign Launch. After these revision rounds and Client approval on text and design, Client-requested changes may be completed for an additional fee and based on RNL creative team availability, pursuant to a Change Order.

A. Records Within Scope

- i. As stated in Section 3 of the SOW, the Services are provided for up to 10,000 of records. The Services for such records will be provided as follows:
 - a. Up to 6,000 of **Inquiry Records** included in the applicant marketing campaign pool.
 - b. Up to 4,000 of **Search Records** included in the applicant marketing campaign.
- ii. RNL will provide weekly suppressions against the Client applicant pool throughout the duration of the campaign.
- iii. **Inquiry Record:** An individual student record classified as a student who has inquired/requested/sought out information about the Client.
- iv. **Search Records:** Student records purchased by Client through a third party such as College Board, National Research Center for College and University Admissions (NRCCUA), Act, Inc., and/or College Bound Selection Service (CBSS).

B. Application Marketing Campaign

- i. **Campaign Launch:** Commencement of activities pursuant to the SOW designed to cultivate applicants.
 - a. RNL manages list purchase for each Campaign Launch on behalf of Client.
- ii. **Outreach Email Template:** The design prototype for an **Outreach Email** or Outreach Email series.
 - a. **Outreach Email:** Emails sent with a call to action intended to cultivate applicants.
- iii. **Outreach Email Version:** An Outreach Email Template with specific outreach messaging (e.g., a nine (9) email series can have nine (9) versions of text in one (1) Outreach Email Template).
 - a. Outreach Emails to Senior Search Record names and Inquiry Records.
- iv. **Included Targeted Non-Responders from RNL Demand Builder:** Search Records that were included in RNL Demand Builder that have high predictive model ranges but do not directly reply to the RNL Demand Builder campaign.

- v. **Phone Campaign Launch:** Commencement of activities pursuant to the SOW designed to cultivate applicants by phone.
 - a. Phone Campaign Launches to all new and existing records with phone numbers which are loaded into phone campaign in four segments.
 - 1. Prospective applicants with a high propensity (Senior Search Record & Inquiry Record) and moderate propensity (search & inquiry) with Dedicated Calling Hours managed by RNL across all records. Propensity is determined by the RNL Enrollment Marketing consultant.
 - 2. RNL will run phone append process to append available phone numbers to records.
- vi. **Calling Segment:** Defined sets of prospective applicant data records grouped by one or more common attributes.
- vii. **Dedicated Calling Hours:** The number of hours the RNL call center provides for calls after the Phone Campaign Launch.
- viii. **Fulfillment Email Template:** The design prototype for a **Fulfillment Email** or **Fulfillment Email series**.
 - a. **Fulfillment Email:** Emails sent in response to an action by a prospective applicant, with information intended to further cultivate applicants.
- ix. **Fulfillment Email Version:** A Fulfillment Email Template with specific fulfillment messaging (e.g., a six (6) email series can have six (6) versions of text in one (1) Fulfillment Email Template).
 - a. Fulfillment Emails based on calling response with already applied, planning to apply, unsure if they are going to apply, or state they will apply by a certain date.
- x. **Applicant Information Package Template:** Design prototype for an Application Information Package.
 - a. **Application Information Package:** A letter with accompanying information about the benefits and features of applying for admission.
 - b. Specifications of the Application Information Package:
 - 1. 8.5" x 11" color letter and application information insert
 - 2. 2/c envelope printed on one side
 - 3. Mailing services
- xi. **Application Information Package Version:** An Applicant Information Package Template with specific text for an Application Information Package.
- xii. **Application Information Package Volume:** The number of Applicant Information Packages provided by RNL.
 - a. Direct Mail of Application Information Packages to records with viable addresses in the campaign.
- xiii. **Personalized Letter with Insert Template:** Design prototype for a **Personalized Letter with Insert**.

- a. **Personalized Letter with Insert:** A letter with a one-page insert providing information on applying for admission and financial aid.
 - b. Specifications of the parent direct mail package:
 - 1. 8.5" x 11" color letter and application information insert
 - 2. 2/c envelope printed on one side
 - 3. Mailing services
- xiv. **Personalized Letter with Insert Version:** A Personalized Letter with Insert Template with specific text for a Personalized Letter with Insert.
- a. Direct Mail to parent's/family of records with viable addresses in the campaign
- xv. **Personalized Letter with Insert Volume:** The number of Personalized Letter with Inserts provided by RNL.
- xvi. **RNL Digital Advertising Impression:** A single display of an **Ad** on a webpage, mobile app, or other delivery medium.
- a. **Ad:** A digital advertisement designed for mobile, display, or social networks.
 - b. Impressions of Targeted Display Advertising through display matching, **Geo-fencing** and Retargeting on application form, only if RNL student application is utilized by Client.
 - 1. **Geo-fencing:** A mobile advertising strategy that targets a user's current location (based off of a phone's active GPS), and serves them Ads via mobile applications while they are in the geo-fenced location.
 - 2. **Retargeting:** Retargeting is an online advertising strategy that involves serving website visitors Ads based on their prior Internet use. For example, retargeting allows a college or university to advertise to individuals across the web that have previously visited select pages of their .EDU site. The strategy involves using cookies.
 - 3. **Targeted Display Advertising:** Matching individuals across devices to deliver Ads to them on the websites and social media outlets (including Facebook, and Instagram) that they visit.
- xvii. **Display Ad Template for Digital Advertising:** Design prototype for Digital Ads.
- xviii. **Display Ad Version for Digital Advertising:** A Display Ad Template for Digital Advertising with specific text.
- a. Display Ad Versions for Digital Advertising will be allocated as follows: Two versions for A/B testing purposes and the third version for Geo-fencing, if applicable.
- xix. **RNL Parent Engagement (6 Emails in a Series):** Fulfillment emails sent to parents of students that provide parent contact information via the RNL search response form. The email content is dynamic and provides parents with information about their students' academic interests, opportunities to connect with Client, details on financial aid and scholarships, and other information regarding Client's value.

C. Modeling Analytics

- i. **Search Model:** Logistic regression analysis from inquiry to application for market analysis that prioritizes four (4) geographic markets in a predictive model, and, when available to RNL, is based on three (3) years of historical Client data.
- ii. **ForecastPlus™ Inquiry to Enrollment Model:** A logistic regression analysis from inquiry to enrollment identifying a student's propensity to enroll at Client based on one (1) year of historical Client data.

D. Consulting, Reports & Support

- i. **Campus Visit:** A visit to the Client's campus to facilitate delivery of Services, including consulting, training, and/or delivering report reviews.
- ii. **Program Reporting:** Reporting on campaign progress and results during and after the campaign.
- iii. **Program Management and Consulting:** Services provided by RNL to manage the program details and provide training and relevant consulting.

E. Software

- i. **AL: Conversational AI for Enrollment:** An online chatbot that can be trained to have 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, broadcasts, and conversation management post-launch;
 - b. Client may utilize and train chatbot for use on Client's website(s); and
 - c. Client may utilize chatbot to send broadcast messages to chatbot subscribers.
- ii. **RNL Visual Caller ID:** Enables caller ID information to appear on recipients screen as Client's name, logo, and location.

