![Benevity — the way the world does good]

Service Descriptions

Definition of the service add-ons

to Client to the extent indicated in an applicable executed order form, change order, signed quote, or statement of work (each, an "Order Document"). For information regarding Benevity's Products, please see the [Product Descriptions](.).[2]

Support Services

Program Administrator Technical Support	
Service Name	**Description**
Technical Account Manager	Client is assigned a named Technical Account Manager (TAM) who has knowledge about Client's organization and program. This service includes a first response time commitment for online support tickets of five business hours. This service is in addition to the base-level of support Benevity provides to Client pursuant to the Service Level Agreement. Further details are outlined in a Statement of Work.[3]
Premium Service Level Agreement (Client Admin)	Client will gain access to a technical support representative team member, with a first response time commitment for online support tickets of 11 business hours.[1]
End User Support	
Premium Service Level Agreement (End User)	Client's end users gain access to a support representative team member. This service includes a first response time commitment for online support tickets of five or 11 business hours as set in Client's Order Document.[1]
Dedicated Phone Line (End User)	Client's end users gain access to 24/7 live support via phone.[1]

1 - This service is in addition to the base-level of support Benevity provides to Client pursuant to the Service Level Agreement. Further details are outlined in a Statement of Work.

2- Benevity's Product Descriptions can be found here:

https://info.benevity.com/rs/970-BMO-559/images/Benevity_Product_Descriptions.pdf

3 - **Dedicated Client Technical Support –** This is a legacy service that is transitioning to Technical Account Manager beginning September 2026.

Managed Services

Program Administrator Services	
Service Name	**Description**
Application Review	Benevity supports grant application management based on Client's guidelines and eligibility

Service	criteria. The Benevity team works directly with nonprofits to gather missing information and improve application accuracy. Client is responsible for the final decision on the grant application.[2]
External Match Request Reviews	Benevity oversees the review of all external match requests on behalf of Client with the aim of streamlining approvals. Benevity approves or declines external match requests based on Client's specific eligibility criteria.[3]
Volunteer Time Reviews	Benevity oversees the review of volunteer time submissions on behalf of Client. Benevity approves or declines volunteer hour submissions based on Client's specific eligibility criteria.[4]
Giving Opportunity Reviews	Benevity oversees the review of donation opportunity submissions on Client's behalf. Each submission is evaluated against Client's eligibility criteria and is either approved and published in Client's Donate module or declined.[3]
Volunteer Opportunity Reviews	Benevity oversees the review of volunteer opportunity submissions on Client's behalf. Each submission is evaluated against Client's eligibility criteria and is either approved and published in Client's Volunteer module or declined.[4]
Nonprofit Curation	The Benevity Nonprofit Curation Service provides Clients with up to five lists that include a curated selection of up to five nonprofits each that align with Client's focus areas and/or geographic preferences. Before recommending these nonprofits, Benevity verifies current charitable registration status, including any state level requirements for American eligible nonprofits, and screens board members and officers (up to 10 individuals per included nonprofit). Benevity also checks for any nonprofit specific sanctions, watchlists, adverse media, and politically exposed persons. This service delivers a detailed one to two-page report with key nonprofit information including name, scope, website, description and screening results. This service may be modified to fit Client's unique audit considerations, to the extent mutually agreed in writing by the parties.
Financial Services	
Reversal	The Reversal service reverses a charitable donation transaction that has been made to support an organization in the Benevity portal, due to an error or omission. In some cases this option may not be available due to regulatory restrictions or if funds have already been disbursed to the organization. For the avoidance of doubt, donations are not refundable and any transaction reversals are at the sole discretion of the recipient Foundation.
Global DAF	Benevity manages the consolidated payment workflow for Client corporate funds on the Client's behalf. The Client provides a pre-payment in USD to the American Online Giving Foundation (AOGF) to be explicitly used to cover Client corporate funds. Then, utilizing equivalency determinations, AOGF will transfer funds every month to the respective foundations (in the correct currencies) to cover the corporate portions of the Client's Donation Report (with the exception of OGF India).

Modified Donation Report	Modifications supported include the breakdown of Donation Reports by transaction type or based on data file information such as cost center or business unit. Unsupported modifications may be available for an added fee upon approval from Benevity.[2,3]
Off Cycle Disbursement	The Off-Cycle Disbursement service is an additional batch of donations that are recommended to be disbursed by Foundations to nonprofits on a schedule that is ad hoc and additive to the typical monthly disbursement cycle. As an example, the Client may request an off-cycle disbursement for an important grant that needs to be expedited or due to a delayed disbursement for late Donation Report payments. This service may be purchased by Clients who have an active subscription to the Donate and/or Grants Management module(s). All terms in the Disbursements Software and Service Information apply to this service.
Donation Report Uploads	Benevity will upload Donation Reports to the Client's vendor portal. This service is intended to streamline the Client's receipt of monthly Donation Reports. The service helps the Client to review and process Donation Reports for payment in a timely manner, ultimately supporting on-time disbursement to nonprofits.[2,3]
Gift of Securities	Benevity offers Client's employees the ability to donate publicly traded securities (stocks, mutual funds, etc.) instead of cash to nonprofits of their choice. As described in an applicable Statement of Work.
Corporate Community Donation Fund	Benevity will manage a special fund that the Client and their employees can donate to that will accumulate with the foundation partner. Once a year, or more frequently, Client will provide donor advice to allocate a portion or all of the community fund towards nonprofits or projects important to Client's company and/or employees.
Risk and Compliance Services	
Premium Nonprofit Screening	Benevity's Premium Nonprofit Screening service provides a comprehensive review of a nonprofit organization. This service expands upon both the Mission & Operations Screening and the Organization & Key Personnel Screening by including additional layers of assessment related to the nonprofit's legitimacy, mission alignment, governance, compliance, and leadership. The resulting report summarizes potential risks in each area to support Client's evaluation of the nonprofit. Additional information about this service is available [here]().
Organization & Key Personnel Screening	Benevity's Organization and Key Personnel Screening service augments nonprofit due diligence by assessing both the nonprofit organization and its leadership for potential risks. This service includes screening the nonprofit and up to twenty-five board members or senior staff against international sanctions and watchlists (including OFAC, UN, and EU), politically exposed person (PEP) lists, and adverse media. The resulting report identifies potential legal, compliance, or reputational concerns to support Client's evaluation of the nonprofit. Additional information about this service is available [here]().
Nonprofit Mission & Operations Screening	Benevity's Nonprofit Mission & Operations Screening service provides a structured assessment of a nonprofit's mission, governance, operational policies, and geographic presence. This service is designed to help Client evaluate the nonprofit's legitimacy, alignment with charitable objectives, and compliance with regulatory expectations. The resulting report summarizes potential risks and considerations in each area to support Client's due diligence process. Additional information about

	this service is available [here]().
Secular Process Review	For unique situations, Benevity offers the ability to exclude religious nonprofit categories but offer inclusions for special projects under those religious nonprofits.
Adverse Media Reports	The Adverse Media Reports service monitors and reviews negative media coverage referencing specific nonprofits, sharing matching articles with clients to provide them with timely information on the nonprofits they support. Having access to this deep screening and timely reporting of adverse media coverage helps Client mitigate risk and ensure up-to-date information on nonprofit partners. Screening results are provided to Client on a weekly basis.

2 – Further details are outlined in a Statement of Work. This service may be purchased by Clients who have an active subscription to the Grants Management module(s).

3 – Further details are outlined in a Statement of Work. This service may be purchased by Clients who have an active subscription to the Donate module.

4 - Further details are outlined in a Statement of Work. This service may be purchased by Clients who have an active subscription to the Volunteer module.

Implementation Packages

Implementation Package	General		
Employee Engagement Includes Donate & Volunteer	Benevity offers three implementation packages to support the Employee Engagement modules (Donate & Volunteer) and platform. The Core Package provides a streamlined solution for foundational program needs. The Plus Package delivers a tailored global experience with extensive configuration options. The Premium Package offers sophisticated, personalized services and strategic partnership support for organizations with complex goals.		
	Core Implementation	**Plus Implementation**	**Premium Implementation**
	• **Project team**: Assigned Project Manager, Implementation Consultant • **Implementation timelines**: 4-8 weeks • **Program availability**: No existing program and/or open to Benevity best practices • **Configuration**:	• **Project team**: Assigned Project Manager, Implementation Consultant • **Implementation timelines**: 6-12 weeks • **Program availability**: No existing Client program and/or open to Benevity best practices	• **Project team**: Assigned Project Manager, Implementation Consultant • **Implementation timelines**: Designed with your project team • **Program availability**: Mature existing Client program with complex workflows requiring consultation • **Configuration**:

Benevity recommended (e.g., comfortable with less choice & more direction) • **Program consulting**: 1 session • **Learning & discovery path**: Digitally-led • **Platform environments**: Production site • **Project support**: Project dashboard, Weekly async updates • **Post-project implementation team support**: 2 weeks	• **Configuration**: Benevity recommended (e.g., comfortable with less choice & more direction) • **Program consulting**: Up to 5 sessions • **Learning & discovery path**: Hybrid digital & live • **Platform environments**: Production site, 1 non-production site • **Project support**: Project dashboard, Weekly live + async updates • **Post-project implementation team support**: 2 weeks, including payroll monitoring	Configured to align with your program goals • **Program consulting**: Designed to fit your program goals[1] • **Learning & discovery path**: Live • **Platform environments**: Production site, 1 non-production site • **Project support**: Project dashboard, Live + async updates, Executive stakeholder meetings • **Post-project implementation team support**: 4 weeks, including payroll monitoring

Employee Groups	Benevity's Employee Groups implementation packages support the creation and management of employee-led groups within organizations. The PlusPackage provides tailored consultation and configuration for organizations looking to establish or enhance their employee groups. The Premium Package offers advanced consultation and additional support for complex, large-scale group structures and goals.	
	Plus Implementation	**Premium Implementation**
	• **Project team:** Assigned Project Manager • **Implementation timelines:** 4-8 weeks • **Program availability:** Existing or non-existing Client program, requiring consultation • **Configuration:** Designed to fit your	• **Project team:** Assigned Project Manager • **Implementation timelines:** Designed with your project team • **Program availability:** Existing or non-existing program, requiring advanced consultation • **Configuration:** Designed to fit your program goals • **Program consulting:** Designed to fit your program goals[1] • **Learning & discovery path:** Live • **Platform environments:** Production site • **Project support:** Designed with your project team • **Post-project implementation team support:** 4

	program goals ● **Program consulting:** Designed to fit your program goals[1] ● **Learning & discovery path:** Live ● **Platform environments:** Production site ● **Project support:** Project dashboard, Weekly live + async updates, Weekly meetings ● **Post-project implementation team support:** 2 weeks	weeks

Grants Management	Benevity's Grants Management implementation packages help to streamline the grant management process, enabling clients to manage applications, approvals, and funding disbursements effectively. The Core Package is ideal for organizations with streamlined programs that need minimal consultation and configuration. The Plus Package is designed to meet more complex program setup needs. The Premium Package offers advanced, personalized consultation and configurations for highly complex, mature programs.

	Core Implementation	Plus Implementation	Premium Implementation
	● **Project team:** Assigned Project Manager, Implementation Consultant ● **Implementation timelines:** 4-12 weeks (4-6 weeks on Grants Essential, 8-12 weeks on Grants Advanced) ● **Program availability:** Existing Basic Program with little to no changes + Open to Best Practice ● **Configuration:**	● **Project team**: Assigned Project Manager, Implementation Consultant ● **Implementation timelines**: 12+ weeks ● **Program availability**: Existing Complex Program, or need additional support for Program Design + Open to Best Practice ● **Configuration**: Benevity recommended to fit with program goals	● **Project team**: Assigned Project Manager, Implementation Consultant ● **Implementation timelines**: 12+ weeks ● **Program availability**: Multiple or mature programs ● **Configuration**: Designed to fit your program goals ● **Program consulting**: Designed to fit your program goals[1] ● **Platform environments**:

	Benevity recommended (e.g., comfortable with less choice & more direction) ● **Program consulting:** 1-5 Design Sessions + Weekly Working Sessions ● **Platform environments:** Staging & Production site ● **Learning & discovery path**: Live ● **Project support:** Project dashboard, Weekly async updates ● **Post-project implementation team support:** 2 weeks	● **Program consulting**: 5-10 Design Session + Weekly Working session ● **Platform environments**: Production site, 1 non-production site ● **Learning & discovery path**: Live ● **Project support**: Project dashboard, Weekly live + async updates ● **Post-project implementation team support**: 4 weeks	Sandbox & Production site ● **Learning & discovery path**: Live ● **Project support**: Project dashboard, Live + async updates, Executive stakeholder meetings as needed ● **Post-project implementation team support**: 4 weeks – 6 months

1 – Includes the standard implementation sessions (e.g., 5-10 program consulting sessions), with additional sessions and meetings available as needed.

Implementation Package Parameters & Details

- **Extended Implementation Timelines:** If the implementation extends beyond the timelines specified in the purchased package, there is a structured approach to manage the extension. While packages are designed to accommodate typical project scope, unforeseen complexities may arise. Additional fees may apply to cover the extra resources and effort required for the extended implementation period.
- **Partial Implementation of Product Modules:** Initial implementation fees cover the launch of the product modules purchased and the configurations outlined in the project charter and the launch authorization, as agreed upon by Benevity and Client. If Client declines to implement certain features included in a product package purchased in the Order Document during the initial launch, a post-launch project can be scoped with the Benevity enhancements team. This phased approach will incur additional fees to ensure comprehensive support.
- **Upgrading to a Higher Tier Implementation Package:** If an organization decides to upgrade to a higher implementation package tier during the implementation process, Benevity will collaborate with the client to facilitate the transition. Additional costs and changes in scope will be discussed and incorporated as needed.

Implementation Services – Packages

Implementation Services – Packages	
Service Name	**Description**
Grants – Implementation Package – Core	Benevity's Core Implementation Package for Grants Management provides a structured and efficient approach to launching or refining a granting program. It provides the initial setup of streamlined workflows, application forms, and access to Benevity's fund disbursement system. The implementation timeline is up to twelve weeks and includes a structured, best-practice approach to launching a granting program. In addition, the package consists of a production and staging environment, project support through a project dashboard with weekly asynchronous updates, and two weeks of post-implementation support. The scope of this service is limited to the initial implementation.[6]
Grants – Implementation Package – Plus	Benevity's Plus Implementation Package for Grants is designed to deliver enhanced flexibility and advanced functionality for organizations managing complex or large-scale granting programs. Over a 12+ week timeline, clients benefit from live learning sessions and 5–10 tailored design and consulting workshops focused on understanding unique program requirements and aligning them with Benevity recommended best practices. Following launch, Benevity provides monitoring and guidance to ensure a smooth transition and strong program engagement. This package covers the initial implementation phase only.[6]
Grants – Implementation Package – Premium	Benevity's Premium Implementation is designed for organizations with sophisticated program requirements. With a customized implementation timeline, live learning and discovery sessions, and tailored consulting, this package offers an executive-level implementation experience. It includes strategic stakeholder engagement, four weeks to six months of post-implementation support to

	ensure a seamless and highly personalized implementation. The scope of this service is limited to the agreed-upon upgrade features.[6]
Employee Engagement Implementation Package - Core	Benevity's Employee Engagement Core Implementation Package enables organizations to establish a workplace giving program with a fast and structured approach. With a four to six week implementation timeline, organizations receive guidance on key configurations such as, donation matching, volunteer rewards and fund disbursement. The program follows a digitally-led learning and discovery approach and includes two weeks of post-launch support to ensure a successful rollout. The scope of this service is limited to the initial implementation.[6]
Employee Engagement Implementation Package - Plus	Benevity's Employee Engagement PlusImplementation Package for can enhance flexibility and features for organizations managing global giving programs. With a six to 12 week implementation timeline, hybrid learning, discovery sessions, and up to five consulting sessions, this package supports complex configurations such as payroll integration, multi-currency giving, and external fundraising. Post-launch payroll monitoring ensures a smooth transition, making it an ideal choice for organizations with international and large-scale giving programs. The scope of this service is limited to the initial implementation.[6]
Employee Engagement Implementation Package - Premium	Benevity's Premium Implementation is designed for organizations with sophisticated program requirements. With a customized implementation timeline, live learning and discovery sessions, and tailored consulting, this package offers an executive-level implementation experience. It includes strategic stakeholder engagement, four weeks of post-implementation support, post-launch payroll monitoring, and extended support to ensure a seamless and highly personalized implementation. The scope of this service is limited to the agreed-upon upgrade features.[6]
Employee Groups – Implementation Package - Plus	Benevity's Plus Implementation Package for Employee Groups helps organizations establish or enhance ERG programs. With a four to eight week implementation timeline, expert-led consulting, and a live learning and discovery approach, organizations receive hands-on support in structuring groups, setting up budgets, and improving engagement tracking. Ongoing support for two weeks post-launch ensures a smooth transition. The scope of this service is limited to the agreed-upon upgrade features.[6]
Employee Groups Implementation Package - Premium	Benevity's Premium Implementation is designed for organizations with sophisticated program requirements. With a customized implementation timeline, live learning and discovery sessions, and tailored consulting, this package offers an executive-level implementation experience. It includes strategic stakeholder engagement, four weeks of post-implementation support, post-launch payroll monitoring, and extended support to ensure a seamless and highly personalized implementation.

Implementation Services – Package Add-Ons

The following add-ons have been bundled for simplicity:

Grants – Global Program Bundle	The Global Program Bundle expands your granting platform's capabilities to support truly international grantmaking. This package includes the setup and implementation of Languages, Currencies, and Cross-Border Disbursements, enabling your organization to design and manage grant programs across multiple regions and beneficiary types. With this bundle, Benevity configuration accommodates up to 10 local language preferences, currency variations, and cross border disbursement requirements. This ensures that grant applications, communications, and disbursements are seamlessly managed in the context of each region's operational and compliance needs. The scope of this service includes the initial setup and configuration to support languages, currencies, and cross-border disbursement workflows. Ongoing localization updates or additional configurations beyond the initial implementation may be subject to additional fees.
Grants – External Portal Bundle	This package includes the implementation of an External Portal that enables external stakeholders to actively participate in key workflows within the Client's Grants Advanced program. The implementation includes configuration of the portal, creation of a supplementary form, and setup of single sign-on (SSO) access.
Grants – Program + Workflow	This add-on enables clients to expand their granting capabilities by adding an additional program and workflow to their existing essential package. It includes administrative access, user capacity, multiple application and supplemental forms, and a configurable multi-stage workflow—providing the flexibility to launch a new grant stream or customize processes for specific funding objectives within the Benevity Grants platform.

Enhancement Services

Implementation Services	
Client Onsite	Benevity's onsite visit during the implementation process helps accelerate success with hands-on, in-person expertise. Benevity works directly with the Client's team to create a collaborative, high-impact experience tailored to Client's organization's goals. By working side by side, we strive for a smooth setup, faster decision-making, and deeper alignment—laying the groundwork for long-term success.
Challenges Implementation	Benevity's Challenges Implementation is designed to provide guidance to support meaningful employee engagement. With a diverse catalog of configurable activities and an intuitive experience for administrators and employees, Benevity helps clients to develop and launch gamified activities that inspire employees to take action.
Workday Integration Implementation Service	For a one-time implementation fee, easily connect Workday with Benevity to integrate employee data and payroll giving into one efficient system. This integration enables accurate, efficient employee contributions and engagement management while reducing administrative burden.The fee includes complete Workday Integration implementation (including requirements gathering, configuration, testing, launch and post-launch monitoring and support) and synchronization to help enable Client CSR teams to enhance giving programs, drive participation, and create a more purpose-driven workplace
Additional Primary Form	This service helps to enhance the Client's Grants Management initiatives with Benevity's tailored grant application form to fit unique program needs. Whether open to all applicants or by invitation only, this solution streamlines the application and review process with built-in category defaulting, approval workflows, and email templates.This service includes implementing a primary application form within a grant program in Grants Essential. The setup includes review configurations, category defaulting, approval workflows, and email templates. Changes to the form after the initial setup may require additional fees.
Additional Supplementary Form	Benevity's supplementary form for the Grants Management Program can help support and streamline dedicated processes to capture essential information and enhance decision-making.This service add-on includes setting up and implementing a new supplementary form within Grants Essential to capture additional information, such as nominations, follow-up surveys, or scored reviews. The scope of this service is limited to the initial configuration, and modifications after implementation may require additional fees.
Impact Report	Benevity's Impact Report Implementation allows organizations to measure and showcase their impact with data-driven reports. The service for this add-on includes setting up and implementing impact report forms and configuring associated reporting workflows, helping organizations assess the outcomes of projects and events. Ongoing report modifications or updates beyond the initial setup may require additional fees.
Submitter Portal	Benevity's Submitter Portal Implementation enhances efficiency and transparency in Grants Management programs. The service includes setting up and implementing the Submitter Portal for a dedicated platform to manage proposal submissions and streamline user

	interactions with a branded experience. The setup is limited to initial configurations, and any modifications after implementation may require additional fees.
Budget & Financial Management	The Budget & Financial Management Implementation service includes setting up and implementing a financial management system to help organizations plan, allocate, and track funding more effectively within Grants Advanced. The setup includes initial configuration of budget parameters, but does not include ongoing financial management or modifications beyond the initial implementation.
Impact Report Form (Including Emails & Triggers)	This service includes setup and configuration, with automated emails and triggers to help streamline reporting workflows and improve data-driven decision-making. The Impact Report Form is designed to collect and report data on the social impact of various programs or initiatives. Configuration may include automated emails and triggers to facilitate data collection and reporting workflows. The scope of this service is limited to the initial setup of the form and its associated functionality.[6]
Additional Localized Experience – Enhancement	This service includes the setup and implementation of Additional Localized Experiences within the Donate module. It enables region-specific configurations to tailor the user experience based on geographical, language, or organizational requirements. The scope is limited to the initial configuration. Any additional localization changes beyond the initial setup may require additional fees.
BOW/Cross Border Giving & Volunteering – Enhancement	The scope of this service is limited to the initial setup and activation of BOW/Cross Border Giving & Volunteering, which enables users to donate cross-border, deepening the impact of clients' programs and making them truly global. Any modifications, additional configurations, or ongoing support beyond the initial implementation may require additional fees.
SSO Update – Enhancement	Upgrade authentication capabilities with an SSO Update. This service helps enable organizations to transition from an existing Single Sign-On setup to a new provider. This enhancement helps maintain seamless operations while supporting evolving security and IT requirements by reconfiguring authentication settings and streamlining user access. The scope of this service is limited to the initial implementation.[6]
SSO Initial Setup – Enhancement	Improve security and user experience with Single Sign On (SSO) Initial Setup. This service allows employees to log in using their existing corporate credentials, reducing password fatigue and simplifying access to the program. Any additional modifications, troubleshooting, or ongoing support beyond the initial implementation may require additional fees.
Basic Payroll Giving – Enhancement	Benevity's Basic Payroll Giving solution provides a straightforward way to integrate employee giving into payroll processes. This solution leverages Benevity's default deduction and success file formats for seamless processing for organizations with a single payroll provider. It supports up to three payroll groups and allows for Benevity's "All Deductions All the Time" data exchange. The implementation includes two rounds of payroll testing to ensure accuracy. The scope of this service includes discovery, configuration & testing, as well as post-launch support of up to two pay periods.
Advanced Payroll – Enhancement	Benevity's Advanced Payroll Giving provides greater flexibility to support multiple payroll providers and teams in organizations with more advanced payroll structures. This service allows for configuring various payroll groups and offers options for processing deductions that align with existing payroll systems.The implementation includes additional rounds of payroll testing to help ensure accuracy and efficiency. This service includes the setup and implementation of Benevity's advanced payroll functionality. This service supports

	organizations with unique requirements, including custom–built file formats and additional testing (including parallel testing) beyond the standard offering. The scope of this service includes discovery, configuration & testing, as well as post–launch support of up to two pay periods.[6]
Historical Data Import	Benevity's Historical Data Import service helps preserve program history and enhance continuity by importing historical data into Client's engagement platform. This service allows organizations to bring in past donations, volunteering, or grant records to provide users a view of their previous contributions and activities. This is a one-time data upload as a PDF file and does not automatically sync with other systems. The scope of this service is limited to the initial import of historical data based on agreed-upon file formats and requirements. Any additional data imports, modifications, or ongoing support beyond the initial implementation may require additional fees.
Additional eSignatures Documents – Enhancement	Enhance document workflows by adding additional eSignature documents to Client's Grants Management program. This service allows organizations to incorporate extra documents requiring electronic signatures beyond the initial setup, ensuring a more efficient and secure approval process. The scope of this service is limited to the configuration of the specified additional document(s) for electronic signature. Any modifications, future additions, or ongoing support beyond the initial implementation may require additional fees.
Technical Consultation – Enhancement	Benevity's Grants Management Technical Consultation service provides guidance on program setup and optimization for organizations looking to modernize their Grants Essential program. This service helps organizations make informed and strategic implementation decisions, ensuring a smooth transition and alignment with business goals. The scope of this service is limited to advisory support on implementation decisions. Any additional technical services, configurations, or ongoing support beyond the initial Consultation may require additional fees.
Additional Language – Supplementary Form – Enhancement	This service adds an additional language to a Supplementary Form within Client's grants Essential program. This service enables organizations to offer forms in multiple latin-based languages, making grants management opportunities more accessible to a diverse audience and supporting global engagement efforts. The scope of this service is limited to the initial language addition based on agreed-upon requirements. Any additional modifications, translations, or ongoing support beyond the initial implementation may require additional fees.
External Tasks (Additional) Implementation	This service adds External Tasks that allow external stakeholders to participate in key workflows to Client's Grants Advanced program. The External Tasks Implementation service enables reviewers, scorers, or feedback providers to complete assigned actions. The scope of this service is limited to the initial setup of the external task functionality based on agreed-upon requirements.[7]
Location Manager Implementation	Benevity's Location Manager Implementation service simplifies grant management and helps improve data organization within Grants Advanced. This service add-on helps to manage locations, associate relevant contacts and tags, and link selected locations to applications. The scope of this service is limited to the initial configuration based on agreed-upon requirements during the scoping process.[6]
Submitter Portal Implementation	Benevity's Submitter Portal Implementation service enhances efficiency and transparency in Grants Management programs. The service includes setting up and implementing the Submitter Portal for a dedicated platform to manage proposal submissions, streamline user interactions, and ensure a branded experience. The setup for this service is limited to initial configurations, and any modifications after

	implementation may require additional fees.
Supplementary Form (Checklist-Assessment) Implementation	This service adds Benevity's Supplementary Form (Checklist-Assessment) to Client's Grants Advanced program. Whether used for follow-up surveys, scored reviews, or nominations, this form helps streamline workflows and improve decision-making. The scope of this service is limited to the initial setup and configuration based on agreed-upon requirements.[6]
LexisNexis Scanning Implementation	Benevity's LexisNexis Scanning Implementation service includes the setup and implementation of automated compliance screening, ensuring organizations are reviewed against global watchlists to identify potential legal or reputational risks. By integrating this layer of security into Grants Advanced, organizations can make informed funding decisions, uphold compliance and corporate responsibility standards, and screen organizations against global watchlists to help identify potential legal or reputational risks. This service covers the initial configuration of scanning parameters and screening workflows. Ongoing scanning, monitoring, or adjustments beyond initial implementation may require additional fees.
External Supplementary Form (Checklist – Questionnaire) Implementation	Benevity's External Supplementary Form (Checklist - Questionnaire) Implementation service helps to expand the capabilities of Client's Grants Advanced program. This service allows organizations to create additional forms, such as checklists or questionnaires, to collect essential information that may not be covered in the main application or submission forms. The scope of this service is limited to the initial setup and configuration based on agreed-upon requirements.[6]
Application Scoring Implementation	Benevity's Application Scoring Implementation service helps enhance the efficiency and objectivity of organizations' grant review processes. This service includes setting up and implementing a structured scoring system that evaluates applications based on predefined criteria.[6]
Impact Report Form (Including Emails & Triggers) Implementation	This service includes setup and configuration, with automated emails and triggers to help streamline reporting workflows and improve data-driven decision-making. The Impact Report Form is designed to collect and report data on the social impact of various programs or initiatives. Configuration may include automated emails and triggers to facilitate data collection and reporting workflows. The scope of this service is limited to the initial setup of the form and its associated functionality.[6]
Supplementary Form (Scorecard) Implementation	This service adds Benevity's Supplementary Form (Scorecard) to Client's Grants Advanced program. These forms help organizations apply weighted scoring, set custom evaluation criteria, and establish pass/fail thresholds, ensuring a consistent and data-driven review process. The scope of this service is limited to the initial setup and configuration of the scorecard form based on agreed-upon requirements.[6]
Additional Languages (Form/Application) Implementation	This service helps organizations leverage multilingual capabilities, supporting a more accessible experience for diverse applicants and program administrators. This service includes the setup and implementation fee for Additional Languages (Form/Application) within Grants Advanced. The scope of this service is limited to the initial setup of the additional language(s) based on agreed-upon requirements.[6]
Additional Languages (Portal) Implementation	This service helps organizations leverage multilingual capabilities, making the portal more accessible to diverse applicants and stakeholders. This service includes the setup and implementation of Additional Languages (Portal) within Grants Advanced. The scope of this service is limited to the initial setup of the additional language(s) based on agreed-upon requirements.[6]

Proposal Template (Dedicated Programs) Implementation	Benevity's Proposal Template for Dedicated Programs helps streamline grant management in Client's Grants Advanced program. This structured framework helps organizations manage specific granting initiatives with defined funding criteria. Each dedicated program can include configured applications, recording tabs, dedicated email templates, and mailbox mapping, ensuring a more organized and efficient grant management process. This service includes the setup and implementation of a Proposal Template (Dedicated Program) within a Grants Advanced. The scope of this service is limited to the initial setup based on agreed-upon requirements.[6]
Project Management – Enhancement – Implementation	This service provides access to a dedicated project manager who leverages best practices, strategic insights, and technology to guide Client through every implementation phase.This service includes the implementation of Project Management across all modules and gives organizations access to a named project manager to support the implementation of Benevity's platform. The project manager facilitates planning, coordination, and tracking using project management tools and resources, such as statements of work, project charters, status reports, and configuration testing workbooks. The scope of this service is limited to project management support during the implementation phase of the service.[6]
Expert Consultation	Leverage Benevity's expertise with Expert Consultation, a tailored service designed to help organizations optimize their use of Benevity's platform. This service provides guidance on feature configuration, workflow enhancements, and operational improvements. The scope of this service is limited to consultation and recommendations defined during the scoping process. 6
Custom Historical Data Import	Benevity's Custom Historical Data Import within the Grants Advanced allows tailored data migration for organizations with unique data requirements when the standard import process is not applicable. This service requires a specialized approach to scope and configure the import. The scope of this service is limited to the initial setup and execution of the custom data import based on agreed-upon requirements.[6]
Custom Reports	Unlock tailored data insights with Benevity's Custom Reports, designed to provide organizations with specialized reporting pulled directly from the platform's database. This service allows for creating reports that align with unique program needs, helping organizations track key metrics and make data-driven decisions. The scope of this service is limited to creating and delivering reports based on agreed-upon specifications.[6]
Rebranding	Benevity's Rebranding service helps ensure Client's Grants Advanced program reflects Client's evolving brand identity. This service allows organizations to update logos, color schemes, and other visual elements to align with new brand guidelines, enhancing the look and feel of their grants management program. This service includes the implementation of Rebranding within Grants Advanced. This service applies when updates are required to align an existing program with new branding elements. The scope of this service is limited to the agreed-upon branding updates.[6]
Custom Integration Implementation	This integration enables payment requests and status updates, allowing for real-time tracking of payment status within the Grants Management Software. This service includes the setup and implementation of Payment Integration (Custom/Bidirectional) within Grants Advanced. The configuration may involve automated data transfers, secure file transfer protocols (SFTP), or custom scripts to support data exchange and interoperability. The scope of this service is limited to the initial setup based on agreed-upon requirements.[6]
SSRS Report Implementation	Benevity's SSRS Reporting Implementation service includes the setup and implementation of an SSRS Report within Grants Advanced. SQL Server Reporting Services (SSRS) is a server-based report generation tool that creates, manages, and delivers interactive or

	printed reports. This service includes the configuration of an SSRS report based on agreed-upon specifications. The scope of this service is limited to the initial setup.[6]
Data Transformations – Enhancement – Implementation	Benevity's Data Transformations Implementation service helps ensure accurate and efficient data connection to optimize Client's Employee Engagement implementation. This service standardizes and aligns key data points—such as country names and business-specific inputs—to meet system requirements. This service includes the implementation of Data Transformations within Employee Engagement. This service supports the preparation, standardization, and formatting of Client data to meet import requirements. Data transformations may include adjustments such as aligning country names, formatting business-specific inputs, and structuring data for compatibility with the system. The scope of this service is limited to the initial data transformation and setup subject to agreed upon requirements.[6]
HRIS Updates and/or Provider Change	This service facilitates the secure transition of user data feeds and payroll-giving configurations when switching HRIS providers. This service includes the implementation fee for HRIS Updates and/or Provider Change within Employee Engagement. The HRIS Updates and/or Provider Change service supports the transition of user data feeds and payroll-giving programs when migrating between HRIS providers. The engagement includes system configuration updates to accommodate the new provider's data structure and format. The scope of this service is limited to the initial setup and transition.[6]
Implement Giving	This service includes the implementation of Giving Module Implementation within Employee Engagement. This service applies when a Client adds the Giving module to an existing Employee Engagement program that previously only included Volunteering. The implementation includes the setup and configuration of the Giving module based on agreed-upon requirements.[6]
Implement Volunteering	Benevity's Volunteering module helps enable employees to give their time to causes and nonprofits that matter to them through the Employee Engagement program. The Implement Volunteering service ensures a seamless transition for organizations that previously only used Giving, providing the setup and configuration needed to successfully launch a Volunteering program. This service applies when a Client adds the Volunteering module to an existing Employee Engagement program that previously only included Giving. The implementation includes the setup and configuration of the Volunteering module based on agreed-upon requirements.[6]
Implement Volunteer Rewards	Incentivize and recognize employee volunteerism by implementing Volunteer Rewards within Client's Employee Engagement program. This service enables organizations to add rewards for volunteering efforts, creating additional employee benefits while amplifying community impact. This service includes the implementation of Volunteer Rewards within Employee Engagement. This service applies when a Client adds Volunteer Rewards to an existing Employee Engagement program. The implementation includes setting and configuring reward parameters, eligibility criteria, and tracking mechanisms based on agreed-upon requirements.[6]
Mergers, Acquisitions, and Spark Site Consolidations	Ensure a smooth transition during mergers, acquisitions, or program consolidations by aligning multiple Employee Engagement programs into a single, streamlined experience. This service provides guidance to assess program needs and configure a unified solution. This service includes the implementation of mergers, acquisitions, and program consolidations within Employee Engagement. The engagement includes scoping the full extent of the program, assessing necessary configurations, and executing the transition. The scope of this service is limited to the initial consolidation based on agreed-upon

	requirements.[6]
Spark URL Change	This service provides guidance and implementation support to transition Client's Employee Engagement program URL while updating related elements for a smooth migration. The engagement includes scoping and planning the transition to ensure necessary updates across the program. Consulting resources are provided to support the migration process. The scope of this service is limited to the initial URL change and related updates based on agreed-upon requirements.[6]
Implementing Benevity's Certified Workday Integration – User Data Only	This service includes the setup and implementation of Benevity's Certified Workday Integration. The integration facilitates the transfer of employee data giving information between Workday and Benevity. This service covers initial configuration and synchronization. Ongoing support, maintenance, and modifications beyond the initial setup may require additional fees.
Implementing Benevity's Certified Workday Integration – Payroll Only	This service includes the setup and implementation of Benevity's Certified Workday Integration. The integration facilitates the transfer of employee payroll giving information between Workday and Benevity. This service covers initial configuration and synchronization. Ongoing support, maintenance, and modifications beyond the initial setup may require additional fees.
Implementing Benevity's Certified Workday Integration – User Data and Payroll Data	This service includes the setup and implementation of Benevity's Certified Workday Integration. The integration facilitates the transfer of employee data and payroll giving information between Workday and Benevity. This service covers initial configuration and synchronization. Ongoing support, maintenance, and modifications beyond the initial setup may require additional fees.
Local Login Authentication Enhancements	Benevity's Local Login Authentication helps facilitate users without SSO access to participate in Client's Employee Engagement program. The service includes implementing Local Login Authentication Enhancements within Employee Engagement. This service applies when a Client requires an alternative login solution for employees who do not have access to Single Sign-On (SSO). The engagement includes configuring or updating the local login feature to enable secure access without SSO. The scope of this service is limited to the initial setup and configuration of local login authentication based on agreed-upon requirements.[6]
User Data File Enhancements	This service allows organizations to update user datafields, add new functionality like content filters, and refine user data to support program goals better. Our team provides consultation, testing, and implementation to support a smooth transition.This service includes the implementation of User Data File Enhancements within Employee Engagement. It applies when modifications are needed for an existing user data file, including updates to demographic information, adding or removing fields, or introducing new functionality such as content filters. The scope of this service is limited to the initial user data file updates.[6]
Custom Budget Tags	Benevity's Custom Budget Tags help optimize Client's Employee Engagement program by aligning with the Client's organizational structure. This service allows organizations to create budget groups based on user data, ensuring funds are allocated efficiently. This service includes the implementation of Custom Budget Tags within Employee Engagement. This service applies when a Client requires additional budget configurations that leverage user data to create distinct budget groups within the program. The engagement includes consultation, testing, and implementing budget tags based on agreed-upon requirements. The scope of this service is limited to the initial configuration of custom budget tags.[6]

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Last updated: December 11, 2025. This document may be updated periodically.

Implement Complex Employee Engagement Modes	Whether introducing a volunteer-only program for a subset of employees or tailoring experiences for different teams, this service supports a seamless setup, allowing organizations to provide tailored engagement opportunities that align with their workforce needs.This service includes the implementation of Complex Employee Engagement Modes within Employee Engagement. This service applies when a Client expands their program to accommodate different employee groups requiring distinct experiences, such as a volunteer-only program if both giving and volunteering are enabled. The engagement includes consultation, testing, and implementation of mode changes based on agreed-upon requirements. The scope of this service is limited to the initial configuration of complex mode adjustments.[6]
Custom Managed Services (One-Time)	This is a generalized managed service offering to be used for any one-off custom work as detailed in a Statement of Work.
Custom Managed Services (Recurring)	This is a generalized managed service offering to be used for any recurring custom work as detailed in a Statement of Work.

Additional Services – Challenges Upgrade

Service	Details	
Challenges Upgrade Implementation (For Clients with Missions)	As part of Benevity's commitment to supporting clients in their transition from Missions to Challenges, Benevity offers two implementation plans to accommodate different levels of support needs. The Essential Plan is designed for clients who are comfortable with a structured, self-guided approach to their upgrade from Missions to Challenges. The Advanced Plan is designed for clients who require a dedicated consultant and strategic guidance throughout their upgrade. These plans provide clients with the necessary resources and guidance to successfully launch their Challenges programs while supporting a smooth transition from Missions. Note: Missions will be disabled prior to enabling Challenges.	
	Essential	**Advanced**
	The Essential Plan is designed for clients who are comfortable with a **structured, self-guided approach** to their upgrade from Missions to Challenges. This plan follows a pre-defined implementation schedule and offers flexible go-live dates through bi-weekly cutovers. Clients will have access to: ● **A structured implementation timeline** with bi-weekly cutover	The Advanced Plan is designed for clients who require a **dedicated consultant and strategic guidance** throughout their upgrade. This plan follows Benevity's standard implementation process, providing structured support for program strategy and execution. Clients will receive: ● **A dedicated implementation consultant** to provide guidance throughout the transition

	dates ● **Self-serve training resources** to support independent learning and execution ● **Bi-weekly office hours** for guidance and troubleshooting This plan does **not** include a dedicated implementation consultant or hands-on content migration support. Clients will be responsible for transferring their content from Missions to Challenges.	● **Consultation on content migration strategy**, including best practices for structuring Challenges programs ● **Product and campaign planning support** to optimize engagement and program outcomes ● **Launch and communications strategy guidance** to support a smooth transition and strong adoption While the Advanced Plan offers a **comprehensive consultative approach**, it is important to note that **Benevity does not provide direct content migration services**. Clients will be responsible for transferring their content from Missions to Challenges.

5 – This fee is for implementation only and does not change or impact the program experience.

6 – Any additional modifications, enhancements, or ongoing support beyond the initial setup may require additional fees.

7 – Any additional modifications, expansions, or ongoing support beyond the initial implementation may require additional fees.