



Service Descriptions

Definition of the service add-ons

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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

End User Support	
Service Name	Description
Dedicated Phone Line (End User)	Client's end users gain access to 24/7 live support via phone. ¹
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
Program Administrator Technical Support	
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
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 Additional information about this service is available here .

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
Additional Custom Reports	The scope of this service includes the design and development of a single custom report within the platform that cannot be fulfilled through standard Reporting Studio functionality. This managed service applies to the creation or update of reports using Benevity Reporting tools. Delivery is

² Benevity, Inc. This document is proprietary and confidential to Benevity.

Last updated: February 17, 2026. This document may be updated periodically.

	subject to a mandatory scoping phase by an Insights Analyst to determine technical feasibility and effort. The scope is limited to the initial delivery of the defined report based on agreed-upon specifications; any subsequent modifications, data field updates, or additional report requests will require a separate purchase of this service. Benevity does not ensure that all requested data visualizations or external integrations are achievable within the current system architecture.
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.
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
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
Grant Application Reviews	Benevity supports grant application management based on Client's guidelines and eligibility 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
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
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
Nonprofit Curation	The Benevity Nonprofit Curation Service provides the Client with a single, curated list of up to five nonprofits that align with the Client's designated focus areas and/or geographic preferences. Nonprofits eligible for inclusion must be listed in the Benevity Causes Portal. The scope and parameters of the service may be adjusted to accommodate the Client's specific audit requirements, to the extent agreed in writing by the parties. Information provided through this service is for informational purposes only and is based on publicly available or third-party sources that Benevity does not control. Benevity does not warrant the accuracy, completeness, or continued availability of such information. The Client is responsible for reviewing the information and conducting any additional research needed to make informed program decisions.
Financial Services	
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.
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.
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.
Faster disbursements	<p>This offering is an optional enhancement available to eligible clients participating in a Corporate Donor Advised Fund or Global Donor Advised Fund offering with a Foundation and making the required minimum advance donations (three months). The enhancement supports a transition from the standard monthly disbursement cycle to a rolling weekly disbursement cycle. Provided sufficient donations have been made, disbursements can occur with consideration of donor advice. This may reduce the typical donation-to-disbursement timeline from an average of approximately 30–60 days to as little as 14–21 days.</p> <p>For the avoidance of doubt, the Benevity Disbursements Software and Service Information continues to govern this offering. Certain reporting timelines will be adjusted to align with the revised disbursement cadence. Donation Reports will no longer be issued for each donation period. Instead, clients may use Benevity’s reporting tools to access up-to-date information. To support the accuracy and completeness of reporting, delivery of some monthly reports may be delayed in certain instances.</p>

Risk and Compliance Services

<p>Adverse Media Reports</p>	<p>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.</p>
<p>Client Giving Match Protection</p>	<p>Benevity performs regular reviews (at least monthly) of credit card transactions made by Client’s users, assessing whether there is a connection between user and credit card holder match, or whether there are potential conflicts or affiliation between the donor and the nonprofit. Where an issue has been identified, Benevity will, as authorized by the applicable Foundation, either: a) remove the funds representing Client’s match from the disbursement to the nonprofit but allow the user’s donation component to remain and be available for disbursement to the nonprofit (an amount representing the match funds would then be "credited" to a future Donation Report); or b) place a hold on disbursements to the nonprofit based on Client’s donation, notify Client of the transaction issue and await Client’s request to either proceed with disbursement or remove the funds representing Client’s match. If Client has not responded within two months, Benevity will release the hold and allow the disbursement, based on user donation and Client match, to proceed.</p> <p>Benevity may receive permission from Client to allow future match donations to proceed where Client has approved the flagged transaction (as opposed to automatically removing the funds representing Client’s match). For the avoidance of doubt, donations are not refundable. The Foundation may make exceptions for errors or mistakes made by donors, but attempts to subvert Client’s Matching Program is not a suitable reason. Benevity may only enable a transaction reversal of a user’s donation with the approval of the applicable Foundation, and at the request of Client.</p>
<p>Nonprofit Mission & Operations Screening</p>	<p>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 the Client’s due diligence process. Additional information about this service is available here.</p>
<p>Organization & Key Personnel Screening</p>	<p>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.</p>
<p>Premium Nonprofit Screening</p>	<p>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.</p>

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.
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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
	<ul style="list-style-type: none"> ● 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: Benevity recommended (e.g., comfortable with less choice & more direction) ● Program consulting: 1 session ● Learning & 	<ul style="list-style-type: none"> ● 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 ● Configuration: Benevity recommended (e.g., comfortable with less choice & more direction) ● Program consulting: Up to 5 	<ul style="list-style-type: none"> ● 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: Configured to align with your program goals ● Program consulting: Designed to fit your program goals¹ ● Learning & discovery path: Live ● Platform

	<p>discovery path: Digitally-led</p> <ul style="list-style-type: none"> ● Platform environments: Production site ● Project support: Project dashboard, Weekly async updates ● Post-project implementation team support: 2 weeks 	<p>sessions</p> <ul style="list-style-type: none"> ● 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 	<p>environments: Production site, 1 non-production site</p> <ul style="list-style-type: none"> ● Project support: Project dashboard, Live + async updates, Executive stakeholder meetings ● Post-project implementation team support: 4 weeks, including payroll monitoring
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Employee Groups	<p>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.</p>	
	Plus Implementation	Premium Implementation
	<ul style="list-style-type: none"> ● 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 program goals ● Program consulting: Designed to fit your program goals¹ ● Learning & discovery path: Live ● Platform 	<ul style="list-style-type: none"> ● 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 goals¹ ● Learning & discovery path: Live ● Platform environments: Production site ● Project support: Designed with your project team ● Post-project implementation team support: 4 weeks

	<p>environments: Production site</p> <ul style="list-style-type: none"> ● Project support: Project dashboard, Weekly live + async updates, Weekly meetings ● Post-project implementation team support: 2 weeks 	
<p>Grants Management</p>	<p>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.</p>	
<p>Core Implementation (only for clients who purchase the Grants - Essential product Package)</p>	<p>Plus Implementation</p>	<p>Premium Implementation</p>
<ul style="list-style-type: none"> ● 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: Benevity recommended (e.g., comfortable with less choice & more direction) ● Program 	<ul style="list-style-type: none"> ● 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 ● Program consulting: 5-10 Design Session + Weekly Working session ● Platform 	<ul style="list-style-type: none"> ● Project team: Assigned Project Manager, Implementation Consultant ● Implementation timelines: Designed with your Project Team ● Program availability: Multiple or mature 12programs ● Configuration: Designed to fit your program goals ● Program consulting: Designed to fit your program goals¹ ● Platform environments: Sandbox & Production site ● Learning & discovery path: Live ● Project support:

	<p>consulting: 1-5 Design Sessions + Weekly Working Sessions</p> <ul style="list-style-type: none"> ● Platform environments: Staging & Production site ● Learning & discovery path: Live ● Project support: Project dashboard, Weekly async updates ● Post-project implementation team support: 2 weeks 	<p>environments: Production site, 1 non-production site</p> <ul style="list-style-type: none"> ● Learning & discovery path: Live ● Project support: Project dashboard, Weekly live + async updates ● Post-project implementation team support: 4 weeks 	<p>Project dashboard, Live + async updates, Executive stakeholder meetings as needed</p> <ul style="list-style-type: none"> ● Post-project implementation team support: 4 weeks - 6 months
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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 - Package Add-Ons

Grants - Global	The Global Program Bundle expands your granting platform's capabilities to support truly
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Program Bundle	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. ⁶ The scope of this service includes the initial setup and configuration to support languages, currencies, and cross-border disbursement workflows.
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

Consultative Support 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.
Service Reserve Units	Benevity's Service Reserve Unit (SRU) Program is an annual subscription that provides a pre-purchased reserve unit system. This service is designed to provide Client with on-demand access to various Benevity services, including technical consulting, configuration, and program optimizations. Service Reserve Units expire at the end of each contract year and do not carry over to subsequent years. SRUs are non-refundable and non-transferable. Usage and remaining balances will be managed and tracked by Benevity's Professional Services team in partnership with the Client Success Manager. Provision of specific services remains subject to effort and scope as defined in the SRU Catalog or applicable Statements of Work.
Technical Audit	Technical Audit helps ensure Client's Grants Management program is running efficiently. This service provides a thorough review of Client's platform setup, workflows, and integrations, identifying areas for improvement and alignment with best practices. The audit may include an assessment of workflows, data structures, integrations, and platform settings. The scope of this service is limited to the initial audit and recommendations. Any

	additional implementations, modifications, or ongoing support beyond the initial audit may require additional fees.
Technical Program Consultation	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.

Implementation Enhancement Services	
Additional Languages Enhancement	This service includes the initial setup and implementation of multilingual capabilities for both the portal and application forms within Grants Management. This service supports Client in providing an accessible experience for diverse applicants and program administrators based on agreed-upon requirements. ⁶ Languages are provided based on the availability and functionality of the product.
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. ⁶
Advanced Payroll Enhancement	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. Any additional modifications, enhancements, or ongoing support beyond the initial implementation may require additional fees.
Advanced Workflow Enhancement	Benevity's Advanced Workflow Enhancement is designed to help manage multi-step processes requiring multiple approvals, reviews, and actions within Client's Grants Management program. This advanced configuration supports intricate workflows, improving efficiency and structured coordination across program stages. This service includes the setup and implementation of one Complex Workflow (Bi-Directional, Over 5 Stages). The scope of this service is limited to the initial setup of the workflow based on agreed-upon requirements. ⁶
Application Scoring	Benevity Application Scoring 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. Any additional modifications, enhancements, 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.
Basic Workflow Enhancement	Benevity's Basic Workflow Enhancement service includes the initial setup of structured workflow with up to five stages within Client's Grants Advanced program. Typical stages include Initiation, Review, Approval, Execution, and Completion. This workflow is designed to improve efficiency by assigning tasks to appropriate individuals or teams and supporting timely completion. The scope of this service is limited to the initial setup of the workflow based on agreed-upon requirements. ⁶
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.
Budget and 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.
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.
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
Custom Historical Data Import	Benevity's Custom Historical Data Import within 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

Custom Reports Enhancement	The scope of this service includes the configuration and implementation of a custom report within the Client's environment based on agreed-upon specifications. The report supports the generation and management of data aligned with Client's program needs. The scope is limited to the initial setup and deployment. Any modifications, data field changes, or additional report requests may be subject to additional fees. Further details are set out in the applicable Statement of Work.
Data Export API Implementation	The scope of this service includes the initial setup and provisioning of API access to facilitate the automated export of Client's program data. This service is designed to allow Client to integrate Benevity data with Client's internal business intelligence and analytics tools. Client is responsible for the development, maintenance, and security of any third-party or internal systems receiving the data. Service is limited to the activation of the API and provision of standard documentation; any custom development or ongoing technical integration support may be subject to additional fees.
Data Export Implementation MFT	This service includes the setup and delivery of a Data Export from Benevity Reporting to the Client's Managed File Transfer (MFT) environment in CSV file format. The exported data is intended for use within the Client's own reporting systems. Clients are responsible for importing and managing this data within their reporting environment. The scope of this service is limited to the export configuration and delivery; Benevity does not provide support for third-party reporting tools or the creation of custom reports outside of the Benevity platform.
Data Transformations Enhancement	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
Employee Engagement 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
Employee Groups – Budget Enhancement	Benevity will enable the Budget functionality within an existing Employee Groups instance. Client is responsible for configuring Budget parameters, allocating budgets to individual groups, and providing instruction to group leaders on the usage of Budgets. This service includes Project Management, Discovery, Administrator Training, and post-launch monitoring for up to two weeks.
Employee Groups – Chapters Advanced Enhancement	Benevity will enable the Chapters feature within an existing Employee Groups instance for between 20 and 50 chapters. The Client will be responsible for content creation, and identifying group leaders and members. This service includes Project Management,

	Discovery, Configuration, Training, and post-launch monitoring for up to two weeks. Adding more than 50 chapters may incur additional costs and must be scoped separately.
Employee Groups – Chapters Essential Enhancement	Benevity will enable the Chapters feature within an existing Employee Groups instance for up to 20 chapters. The Client will be responsible for content creation, and identifying group leaders and members. This service includes Project Management, Discovery, Configuration, Training, and post-launch monitoring for up to two weeks.
Employee Groups – SSO Enhancement	Benevity will either (i) update an existing Single Sign-On (SSO) connection for Employee Groups to support a new identity provider or authentication method, or (ii) add a new SSO connection to an existing Employee Groups instance. This service includes standard implementation of the SSO connection. If additional work is required—such as manually updating the unique identifiers of existing users or converting users from local login to SSO—such work may incur additional costs and must be scoped separately.
eSignature Enhancement	This service includes the initial configuration and integration of eSignature functionality within Grants Management, to enable electronic signing of contracts and agreements. This service includes the setup of up to two initial document templates and integration with a supported third-party eSignature provider (such as DocuSign). Client is responsible for maintaining an active account with the designated third-party provider. That provider must provide front-line support to clients if there are issues within the esignature functionality. This service is limited to the initial configuration; any additional document templates, modifications to signature workflows, or ongoing technical support may be subject to additional fees.
External Portal Enhancement	This service includes the configuration and implementation of an external-facing portal within Grants Advanced, designed to allow external stakeholders to interact with Client’s program. This service enables the setup of a branded interface for proposal submissions and the configuration of up to two designated external tasks (such as scoring, reviewing, or feedback). External users are granted limited access to these specific external functions only. The service is limited to the initial setup based on agreed-upon requirements; any additional tasks, portal modifications, or ongoing support may be subject to additional fees.
Linked Submissions (Event Management)	The setup fee covers the end-to-end configuration of the Linked Submissions framework, including the design of custom parent-child data structures, mapping tools, and multi-activity reporting templates. It also encompasses the logic for automated post-event workflows, ensuring your specific email triggers and result forms are fully integrated and tested for launch.
Giving Implementation	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
Grants Management Enhancement	The scope of this service includes the delivery of configurations or technical enhancements within the Grants Management module as specified in a separate, agreed-upon Statement of Work. This service is designed to support Client in addressing unique program requirements that fall outside of standard feature sets. Delivery is limited to the initial setup of the defined enhancement; any subsequent modifications, re-configurations, or ongoing

	support after the initial implementation may be subject to additional fees.
Grants Program Change (Minor, Medium, Complex)	This service allows clients to request existing changes to already launched and live programs. This may include minor changes, medium changes, or complex changes that impact program workflows and functionality. The scope is limited to the initial setup based on agreed requirements. 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. Grants: Frequently used and reported historical data is accurately migrated to your grants essential platform to support your program's purposes. Employee Engagement: This is a one-time data upload to your Employee Engagement platform 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. 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
Implementation 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
Integrations Enhancement	This service includes the initial setup and configuration of a data integration between Grants Advanced and Client's internal or third-party systems (such as Accounts Payable or financial management tools). This service is designed to facilitate the transfer of data, including payment requests and status updates, via standard file formats, SFTP, or custom scripts as defined in the scoping process. Client is responsible for the compatibility and security of Client-side systems. This service is limited to the initial implementation based on agreed-upon requirements; any subsequent modifications, custom development for bidirectional synchronization, or ongoing technical support may be subject to additional fees.
LexisNexis Scanning Enhancement	Benevity's LexisNexis Scanning Enhancement 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.
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
Location Manager	The setup fee covers the custom field mapping, and workflow configuration required to integrate the Location Services repository seamlessly into your Grants Advanced environment.
Mergers or Acquisition	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
Post Approval Activities Enhancement	This service includes the initial configuration of post-approval workflows or dedicated granting initiatives within Grants Advanced. Configuration may include impact report forms, proposal templates, recording tabs, and mailbox mapping aligned to Client's funding criteria. This service supports automated data collection and program management through configured triggers and email notifications. The scope is limited to the initial setup based on agreed requirements. ⁶
Primary Forms Enhancement	This service adds an additional Primary Form to support distinct granting initiatives of Client's Grants Management program. This service enables organizations to create a separate form tailored to specific funding opportunities or program requirements, supporting greater flexibility and streamlined application management. The scope of this service is limited to the initial setup of the additional form based on agreed specifications. 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
Site Consolidation	This service includes the assessment and configuration required to unify separate Employee Engagement programs or sites into a single environment. This service supports Client during mergers, acquisitions, or program consolidations by executing the transition in accordance with agreed-upon scope. Client is responsible for providing all necessary data and organizational mapping required for the consolidation. This service is limited to the initial execution of the consolidation. ⁷
SSO Enhancement	This service is limited to a single configuration event, specifically either the initial setup of Single Sign-On (SSO) authentication or one defined reconfiguration required to transition to a new identity provider. Client is responsible for providing necessary technical specifications and ensuring the compatibility of Client's internal IT infrastructure. Any subsequent changes to Client's identity provider, HRIS, or authentication protocols will require the purchase of a separate SSO Enhancement service. The scope is limited to the initial configuration and testing of the connection; any troubleshooting of Client-side network issues or ongoing technical support may incur additional fees.

Supplementary Forms Enhancement	This service includes the setup and configuration of an additional supplementary form within the Grants Management, such as a scored review, nomination, scorecard, or checklist-assessment. This service allows Client to collect information beyond the initial application, applying criteria such as weighted scoring, custom evaluation fields, or pass/fail thresholds. The scope is limited to the initial configuration of the form based on agreed-upon requirements. ⁷
Submitter Portal	This service covers the initial setup of a centralized digital hub where applicants and grantees can electronically create, submit, and manage their grant applications, reports, and supporting documentation throughout the entire funding lifecycle.
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
Volunteer Rewards Implementation	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
Volunteering Implementation	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
Workday Integration Implementation	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.
Workday Integration Implementation Service - 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.
Workday Integration Implementation -	This service includes the setup and implementation of Benevity's Certified Workday Integration. The integration facilitates the transfer of employee data giving information

User Data Only	between Workday and Benevity. This service covers initial configuration and synchronization. Ongoing support, maintenance, and modifications beyond the initial setup may require additional fees.
Workday Integration Implementation Service - 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.

Additional Services - Challenges Upgrade

Service	Details	
Challenges Upgrade Implementation (For Clients with Missions)	<p>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.</p> <p>These plans provide clients with the necessary resources and guidance to successfully launch their Challenges programs while supporting a smooth transition from Missions.</p> <p>Note: Missions will be disabled prior to enabling Challenges.</p>	
	Essential	Advanced
	<p>The Essential Plan is designed for clients who are comfortable with a structured, self-guided approach to their upgrade from Missions to Challenges.</p> <p>This plan follows a pre-defined implementation schedule and offers flexible go-live dates through bi-weekly cutovers.</p> <p>Clients will have access to:</p> <ul style="list-style-type: none"> ● A structured implementation timeline with bi-weekly cutover dates ● Self-serve training resources to support independent learning and execution ● Bi-weekly office hours for 	<p>The Advanced Plan is designed for clients who require a dedicated consultant and strategic guidance throughout their upgrade.</p> <p>This plan follows Benevity’s standard implementation process, providing structured support for program strategy and execution.</p> <p>Clients will receive:</p> <ul style="list-style-type: none"> ● A dedicated implementation consultant to provide guidance throughout the transition ● Consultation on content migration strategy, including best practices for structuring Challenges programs ● Product and campaign planning support to optimize engagement and program outcomes

	<p>guidance and troubleshooting</p> <p>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.</p>	<ul style="list-style-type: none"> ● Launch and communications strategy guidance to support a smooth transition and strong adoption <p>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.</p>
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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.