



Product Descriptions

Definition of the platform, product modules, and add-ons

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Product

Module Name	Description					
Platform	<p>Benevity’s Platform enables the CSR and Granting Administrator to access functionality that organizes, manages, and reports on their social impact program.</p> <p>Clients are required to purchase a Platform module to access the features available in the Product Modules.</p> <table border="1" data-bbox="285 583 1513 1386"> <thead> <tr> <th data-bbox="285 583 899 636">Essential</th> <th data-bbox="899 583 1513 636">Advanced</th> </tr> </thead> <tbody> <tr> <td data-bbox="285 636 899 1386"> <p><i>Platform - Essential</i></p> <ul style="list-style-type: none"> Standard out-of-the-box reports Single language² Single currency⁴ Single budget Single SSO integration Cause self-certification Cause filters search Content streams User account creation Use user information to segment and target content <p>When purchased with Donate or Community Investment:</p> <ul style="list-style-type: none"> Access to disbursing donations Access to cross-border donations Tax effectiveness in a single country for select applicable donations¹ </td> <td data-bbox="899 636 1513 1386"> <p><i>Platform - Advanced</i></p> <p>Features available in addition to the features in Essential.</p> <ul style="list-style-type: none"> Multiple languages⁵ Multiple currencies⁴ Multiple budgets <p>When purchased with Donate or Community Investment:</p> <ul style="list-style-type: none"> Tax effectiveness in multiple countries for select applicable donations¹ </td> </tr> </tbody> </table>		Essential	Advanced	<p><i>Platform - Essential</i></p> <ul style="list-style-type: none"> Standard out-of-the-box reports Single language² Single currency⁴ Single budget Single SSO integration Cause self-certification Cause filters search Content streams User account creation Use user information to segment and target content <p>When purchased with Donate or Community Investment:</p> <ul style="list-style-type: none"> Access to disbursing donations Access to cross-border donations Tax effectiveness in a single country for select applicable donations¹ 	<p><i>Platform - Advanced</i></p> <p>Features available in addition to the features in Essential.</p> <ul style="list-style-type: none"> Multiple languages⁵ Multiple currencies⁴ Multiple budgets <p>When purchased with Donate or Community Investment:</p> <ul style="list-style-type: none"> Tax effectiveness in multiple countries for select applicable donations¹
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Platform - Community Investment only	<p><i>Platform - Community Investment only</i></p> <p>This platform is for clients who purchase only the Community Investment module.</p> <p>Please refer to the list of features noted in the Community Investment section.</p>					
Employee Groups	<p>Employee Groups is Benevity’s employee resource group solution that powers culture-building programs and makes it easier for employees to discover, join, create, manage and participate in employee-led groups.</p> <table border="1" data-bbox="285 1751 1513 1894"> <thead> <tr> <th data-bbox="285 1751 899 1806">Essential</th> <th data-bbox="899 1751 1513 1806">Advanced</th> </tr> </thead> <tbody> <tr> <td data-bbox="285 1806 899 1894"> <p><i>Employee Groups - Essential</i></p> <ul style="list-style-type: none"> Multiple languages⁵ </td> <td data-bbox="899 1806 1513 1894"> <p><i>Employee Groups - Advanced</i></p> <p>Features available in addition to the features</p> </td> </tr> </tbody> </table>		Essential	Advanced	<p><i>Employee Groups - Essential</i></p> <ul style="list-style-type: none"> Multiple languages⁵ 	<p><i>Employee Groups - Advanced</i></p> <p>Features available in addition to the features</p>
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² Benevity, Inc. This document is proprietary and confidential to Benevity.

102024. This document may be updated periodically. For the most up-to-date version of the document, view [here](#).

	<ul style="list-style-type: none"> • Ability to have multiple categories for ERG groups • Engagement reports • Discussions • Event management 	in Essential. <ul style="list-style-type: none"> • Multiple budgets • Budget expense reporting • Multiple chapters • Labels⁶
Community Investment	Community Investment enables companies to access different ways to give back to your community, from in-kind sponsorships to local causes to cross-border grants with external reviewers. Benevity’s robust solution can help you streamline and automate the grant application, internal and external review cycles, and send funds using Benevity’s disbursement engine.	
	<p>Essential <i>Community Investment - Essential</i></p> <ul style="list-style-type: none"> • Out-of-the-box workflows and application forms • Cross-border grants • Sponsorship disbursements⁷ • In-kind donations⁷ • 1 Admin account, 10 users • 2 Primary application forms • 4 supplementary forms • 2 languages (1 main language & 1 additional language) • Historical data import 	<p>Enterprise <i>Community Investment - Enterprise</i></p> Refer to your quote for specific features you are entitled to.
Volunteer	Benevity’s Volunteer management tool enables companies to run in-person or virtual volunteering events, schedule and track hours, and build a community for those who volunteer together. Reward your employees for volunteering using Volunteer Rewards.	
	<p>Essential <i>Volunteer - Essential</i></p> <ul style="list-style-type: none"> • Automated volunteer time tracking • Private cause created volunteer opportunities - specific to the Client • Public cause created volunteer opportunities - available to the public • Volunteer Rewards⁶ 	

<p>Donate</p>	<p>Benevity’s donation management enables employee donations through payroll or major payment methods, corporate matching, disbursement of donated funds via EFT, and generation of donation documentation for you and your employees. For EFT, we also validate the payment-receiving methods of eligible causes.</p>	
	<p>Essential <i>Donate - Essential</i></p> <ul style="list-style-type: none"> ● Single currency giving ● Single localized experience ● Automated matching functionality in single currency ● Apple Pay, Credit Card, PayPal giving ● Single currency corporate donations ● Peer matching ● Allocating user credits available in a single currency ● Single currency seeding ● User-Created Giving Opportunities ● Volunteer Rewards⁸ ● Internal friendraising ● Cause Filters - matching/rewards ● Political Action Committee Matching (PAC)¹⁰ 	<p>Advanced <i>Donate - Advanced</i></p> <p>Features available in addition to the features in Essential</p> <ul style="list-style-type: none"> ● Multi-currency giving ● Multiple localized experiences ● Automated matching functionality in multiple currencies ● Payroll giving ● Corporate and User Gift Cards¹⁰ ● Allocating user credits available in multiple currencies ● Community Impact Portal ● External friendraising ● Global giving¹ ● Teams⁸

- 1 - Tax-effective in select countries where available. Client must enable applicable tax-effective localized experiences. May not be tax effective for all users. For Essential Platform clients, clients' choice of single currency, language and tax effectiveness must be aligned.
- 2 - Canadian-based clients have access to both English and Canadian French languages.
- 3 - Localized experiences enable clients to use currency and language experiences. When implementing, the Benevity Implementations team will recommend best practices to optimize the client's program.
- 4 - Currency experiences are provided based on the availability and function of the product. When implementing, the Benevity Implementations team will recommend best practices to optimize the client's program.
- 5 - Languages are provided based on availability and functionality of the product. When implementing, the Benevity Implementations team will recommend best practices to optimize the client's program.
- 6 - Labels includes the ability to create labels and label groups to organize and identify Groups and Chapters by a common characteristic, making it easier for employees to find the Groups they want to join
- 7 - Sponsorships and in-kind donations apply to corporate donations where the donor receives something in return, for example, table tickets at a charity event, corporate advertising in exchange for a donation or any other benefit received in exchange for a donation.
- 8 - Volunteer Rewards enables Client to reward users when they volunteer at eligible causes. Eligible users receive monetary rewards for approved volunteer work that can be donated to eligible causes. For clients to use the Volunteer Rewards, the client is required to purchase both the Donate and the Volunteer module.
- 9 - Available for clients, requires additional scoping by the Implementations team.
- 10 - Community Impact Portal must be configured for this feature to be available.

Product Add-ons

Add-on Name	Module Required	Description
Workday Integration	Donate or Volunteer	The Workday Integration facilitates the flow of data to provision and deprovision user accounts and to process donations made via payroll via the Donate module. The integration will only provide data to Benevity to the extent explicitly authorized by Client.
Employee Giving Impact Report	Donate	<p>Employee Giving Impact Report, powered by our partner Impact Genome, consist of five separate reports quantifying and analyzing standardized social impact outcomes for Client’s employee giving donations, corporate matching and any related rewards initiatives. These reports include:</p> <ul style="list-style-type: none"> ● Impact Overview ● UN SDG Alignment ● Geography ● Beneficiary Impact ● Impact by Nonprofit & Outcome Details <p>Impact Genome will also provide Client with one live call to answer questions and support the interpretation of the Impact Reports that may be recorded and shared to Client, if desired.</p> <p>The Impact Reports will be provided on a quarterly basis during the applicable subscription period.</p>
Challenges	Donate or Volunteer	Benevity’s Challenges functionality enables the Client and users to participate in and measure activities relating to areas such as environmental sustainability, wellbeing, diversity and inclusion or other socially desirable behaviors.
Employee Volunteer Impact Report	Volunteer	<p>Employee Volunteer Impact Report, powered by our partner Impact Genome, consist of five separate reports quantifying and analyzing standardized social impact outcomes for Client’s employee giving donations, corporate matching and any related rewards initiatives. These reports include:</p> <ul style="list-style-type: none"> ● Impact Overview

		<ul style="list-style-type: none"> • UN SDG Alignment • Geography • Beneficiary Impact • Impact by Nonprofit & Outcome Details <p>Impact Genome will also provide Client with one live call to answer questions and support the interpretation of the Impact Reports that may be recorded and shared to Client, if desired.</p> <p>The Impact Reports will be provided on a quarterly basis during the applicable subscription period.</p>
VolunteerMatch	Volunteer	Intergrated product with VolunteerMatch. Allows users to search, browse and discover relevant volunteer opportunities and events.
Additional Program	Community Investment	Includes all the features noted in the Community Investment Essential module.
Admin User	Community Investment	Access given to program administrators who have primary contact with Benevity, and full access to the management interface, including self serve user management.
Additional users	Community Investment	Access given to reviewers and all other general users in the management interface. Permissions can be set up to restrict users from various parts of the review process.
Primary Form	Community Investment	The main application form for a program that can be open or set to invitation only. A primary form includes associated reviewer and category defaulting, approval workflow and email templates.
Supplementary Form	Community Investment	Can be used to create a nomination form, follow up survey or scored review. Nomination forms and follow up surveys include email templates. Scored reviews leveraged only by users in the management interface with access to grant requests.

Implementation Packages

Implementation Package	General		
Employee Engagement	Benevity offers three implementation packages to support the Employee Engagement modules (Donate & Volunteer) and platform. The Essential Package provides a streamlined solution for core program needs. The Advanced Package delivers a tailored global experience with extensive configuration options. The Premium Add-On offers sophisticated, personalized services and strategic partnership support for organizations with complex goals.		
	Essential	Advanced	Premium Upgrade
	<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 & discovery path: Digitally-led ● Platform environments: 	<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 sessions ● Learning & discovery path: Hybrid digital & live ● Platform 	<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:

	<ul style="list-style-type: none"> Production site ● Project support: Project dashboard, Weekly async updates ● Post-project implementation team support: 2 weeks 	<ul style="list-style-type: none"> 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 	<ul style="list-style-type: none"> 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
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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 Advanced Package provides tailored consultation and configuration for organizations looking to establish or enhance their employee groups. The Premium Add-On offers advanced consultation and additional support for complex, large-scale group structures and goals.</p>	
	Advanced	Premium Upgrade
	<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 	<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

	<p>your program goals</p> <ul style="list-style-type: none"> ● Program consulting: Designed to fit your program goals¹ ● Learning & discovery path: Live ● Platform environments: Production site ● Project support: Project dashboard, Weekly live + async updates, Weekly meetings ● Post-project implementation team support: Up to 2 months 	<p>support: Designed with your project team</p>
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<p>Community Investment</p>	<p>Benevity’s Community Investment implementation packages help streamline the grant management process, enabling companies to manage applications, approvals, and funding disbursements effectively. The Essential Package is ideal for organizations with streamlined programs that need basic setup and consultation. The Premium Add-On offers advanced consultation and configuration for more complex, mature programs. The Enterprise module is designed to meet more complex program setup needs for organizations.</p>		
	<p>Essential</p>	<p>Premium Upgrade</p>	<p>Enterprise</p>
	<ul style="list-style-type: none"> ● Project team: Assigned Project Manager, Implementation Consultant ● Implementation timelines: Up to 6 weeks ● Program 	<ul style="list-style-type: none"> ● Project team: Assigned Project Manager, Implementation Consultant ● Implementation timelines: Designed with your project team 	<ul style="list-style-type: none"> ● Project team: Assigned Project Manager, Implementation Consultant ● Implementation timelines: 12+ weeks ● Program

	<p>availability: Granting application form and approval workflow ready</p> <ul style="list-style-type: none"> ● Configuration: 1-2 streamlined programs ● Program consulting: Benevity recommended best practices integrated in build ● Platform environments: Staging & Production site ● Project support: Project dashboard, Weekly async updates ● Post-project implementation team support: 2 weeks 	<ul style="list-style-type: none"> ● Program availability: Requires consultation for complex or multiple programs ● Configuration: 3+ programs, designed to fit your program goals ● Program consulting: Designed to fit your program goals¹ ● Platform environments: Staging & Production site ● Project support: Project dashboard, Live + async updates, Executive stakeholder meetings as needed ● Post-project implementation team support: 4 weeks 	<p>availability: Multiple or mature programs</p> <ul style="list-style-type: none"> ● Configuration: Designed to fit your program goals ● Program consulting: Designed to fit your program goals¹ ● Platform environments: Sandbox & Production site ● Project support: Project dashboard, Live + async updates, Executive stakeholder meetings as needed ● Post-project implementation team support: 4 weeks, Enhancement sprint support
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1 - Includes the standard implementation sessions (e.g., five 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.