ONGOING SERVICES
DESCRIPTION

Last update: March 1, 2022
Introduction

Managing the requirements of your philanthropic programs has never been easier with CyberGrants robust and intuitive platform. When all your giving is unified on one platform, not only is your life easier, you also have a better view of the results you’re delivering within your organization, and the impact you’re making on the world.

The deliverables in this document are a description of the Ongoing Services for the CyberGrants Employee Engagement, and Grants Management System (“System”) for the Client’s philanthropic programs (“Program”).

CyberGrants System and Ongoing Services provides a means for the Client or its Authorized Users (also referred herein as Client’s employees or “Users”) to select a grantee or Organizations (also referred here-in as “non-profit(s)”) that have been determined to be eligible for Client's Program.

Grants Management and Employee Engagement Program Administrators

Administrators will utilize an administrative interface to configure the System and manage the day-to-day activity between employees and Organizations (also referred to as “Client Portal”). The following is a high-level list of capabilities that the administrative interface will provide to Program administrators. Note: certain activities will vary based upon the Disbursement service contracted by the Client.

- Create and customize one or more employee Programs (matching gifts, volunteer recognition, event-driven volunteerism, disaster relief campaigns, special appeals, employee giving campaigns, United Way campaigns)
- Execution of disbursements, based upon the disbursement service being utilized
- Maintain Program limits and minimums
- Support client-specific minimums and maximums per employee contribution amounts or hours
- Configure employee and nonprofit eligibility rules
- Allow client to exclude ineligible employees from participating in the various employee giving Programs based on rule sets
- Allow client to exclude ineligible organizations from receiving matching gift, volunteer grant, or campaign contributions based on rule sets
- Establish rules to maintain a minimum and/or maximum number of participants in a team participating in an event
- Create special appeals or disaster events in emergent situations and partner with one or several Organizations
- Offer payroll deduction (one-time or continuous) using a fixed amount or percent of pay
- Allow multiple Organizations to be supported through a single payroll deduction transaction
- Configure credit card processing and direct-to-charity check and ACH payments
- Override match amounts that are automatically calculated in special cases
- Identify and follow up on anomaly situations such as lost checks or discrepant transactions
- Perform batch approvals
- Allow administrators to review and approve Program grants individually or as a batch process
• Perform gift-batching and scheduled disbursements to non-profit organizations
• Generate follow-up reminders to nonprofits to verify receipt of funds
• Design custom fields for Program detail (per Program)
• Run Ad Hoc and Standard Reports

Employee Portal

The System will serve as an online portal for employees to search for and engage in a variety of employee Programs, including but not limited to payroll programs, matching gifts, volunteerism, disaster relief, employee assistance, and dollars for doers. The employee portal functionality allows employees to perform any of the following, depending on which Programs are configured and how they are configured:

• Review Program rules for employees and provide certification of all eligibility requirements
• Access their full history and status of all prior activity (paid, unverified, etc…)
• Search for organizations with contributions or volunteer activity by keywords, proximity, and EIN
• Register gifts as direct-to-charity, credit card, or payroll deduction (per client preference)
• Provide gift designations to specific purposes within Organizations
• Nominate Organizations for inclusion in one or more employee Programs
• Find, create, and or register for volunteerism events
• Manage personal profile to tailor CyberGrants for personal preferences

Organization Portal

Organizations benefit from the use of one portal to manage their interactions with clients for grants and employee Program contributions and volunteer time. The Organization portal provides non-profits with the ability to:

• Review Program rules for Organizations and provide certification of understanding of all eligibility requirements
• Register and create login credentials (list verification against IRS Exempt Organization Business Master File, NCES
• Tables, and England/Wales, Canada, and Australia governmental-supplied lists
• Confirm their U.S. tax exempt status by providing 501 (c)(3) and System auto-verifies each time the non-profit logs in; compare to charitable listings for England/Wales, Canada and Australia
• Update contact information and add additional contacts
• Update organizational information
• Verify matching gifts or other employee Program contributions in batch
• View status of prior requests
• Access customized, client-specific FAQs and submit support requests online
• Complete required vetting detail information and upload relevant documents
Additional Capabilities

Administrative Capabilities

- Instant 501(c)(3) verification through the IRS Exempt Organization Business Master File, and instant NCES ID (National Center for Education Statistics). Verifications occur at various stages of the giving process.
- Access to charities listing provided by the governments of Australia, Canada, and England/Wales.
- Automated watch list scanning (includes OFAC), notifications and overrides set at industry standard levels.
- Automated event-based correspondence.
- Online surveys.
- Unlimited Custom Fields (Organizations, Requests, Payments, Budgets, Contacts).

Reporting and Communications

- Reporting in PDF, HTML, RTF, ASCII, CSV, Excel.
- Matrix/Grid Reporting with Averages, Totals, Percent of Totals.
- Tabular Reports and General Listings.
- Group Above Reports with Sorting, Subtotals, Page Breaks, Final Totals.
- Financial, Budget, Classification, Top N Reports.
- Custom Letter Template Creation.
- E-mail or Printed Format Options.
- Post-grant impact analysis.
- Standard dashboard with pre-built ‘portlets’.

Analytics (via CyberGrants Insights, if contracted)

- Standard role-based dashboards with the ability to explore data using filters and criteria.
- Export information in common formats such as Excel and PDF.
- Configure standard dashboards to align to client-centric use cases.

CyberGrants Help Center

- Knowledge base articles for administrative users.
- Access to training programs and content.
- Product Updates and news.

Budgeting and Payments

- Payment Scheduling.
- Multi-year Payments.
- Split Payments on Multiple Budgets.
- Immediate Budget Debiting.
- Payment Status Tracking.
- Secure Budget Access per Detail Line per User.
• Budget Transfers
• Hierarchical Budgeting
• Deductible / Non-deductible Tracking

**Ongoing Support for Employees and Organizations of CyberGrants Client**

If the Contact Center is being utilized to support employees (or other authorized Client donors) or Organizations; for Employee Engagement Programs a direct-dial telephone number and e-mail address will be provided for contact support. For grants programs an e-mail address will be provided. Client’s employees and Organizations can also request support via the many support links throughout the CyberGrants System.

Contact Center services are provided from 8 a.m. to 8 p.m. (United States EST) Monday through Friday, excluding holidays. Support requests that come in outside business hours will be responded to accordingly.

The following is a list of the support Services to be provided by the CyberGrants Contact Center team:

• Telephone and / or e-mail-based service support requests from Client’s employees, retirees and or non-profit organizations. These include but are not limited to: questions about access, program rules and information, payment / gift status, gift registration.
• Requesting support from the Contact Center through the CyberGrants System.
• Client specific program guidance is incorporated into the support provided to employees and non-profits.
• Contact Center support inquiries are categorized for analysis and service recommendations (where appropriate).

**Ongoing Support for Administrators of Client’s Program**

The CyberGrants Client Management team (also known as “the POD team”) will provide direct support to the Client during regular hours of operation (8 a.m. to 5 p.m. United States ET), Monday through Friday, excluding holidays.

The POD team is uniquely designed to provide high-quality support through CyberGrants’ POD construct, which provides support through a group rather than an individual. This approach enables consistent support coverage and enables CyberGrants to leverage collective knowledge and experience when providing support and guidance to the Client.

The following is a list of the support services to be provided by the POD team:

• **Client Portal Access:** Clients can log into the Client Portal to access support, update cases, view issues and case statuses (available 24/7). This is accessible to all Users via the Help Link in CyberGrants.
• **Assigned Case Numbers:** Upon requesting support, a case will be opened and entered into a tracking system resulting in a unique case number. This case number will be provided to the User requesting support and will be left open until the case is resolved. Each time the User requests support with a different question or issue, a new case will be created in the tracking system.
• **Problem Resolution:** The POD team is responsible for gathering the User's information and resolving any issues by listening and asking clarifying questions to provide a personalized solution. When evaluating the issue or query of the User, the POD team shall determine whether the POD team can resolve the question or issue raised by the User. If not, the question or issue will be assessed for resolution through fee-based options such as advanced support, professional service, training, customization, or other available options to resolve the Client’s question or issue.

• **Email Support Outreach:** The Client’s Program administrators can submit questions and issues and request information. Standard service level objectives outline specific response and resolution times (see the Master Service Agreement and or governing contract for the CyberGrants service).

• **Client Representation:** The POD team will represent the Client across CyberGrants services, including but not limited to the Contact Center, Disbursement Services, Onboarding, and Technical Services. The POD team will also serve as a liaison between Client and CyberGrants team members to discuss, design, and refine proposed enhancements, custom reports, or customizations by Client.

• **Cost Estimates:** The POD team will provide a time and cost estimate for custom report requirements when appropriate.

• **Primary Contact:** The POD team serves as a primary point of contact for the Client for escalation matters regarding System issues, batch integration issues, change management, and change control.

**Change Request Management Process and System Updates**

• If Client wishes to request to change or add an activity or item not included in the scope of this appendix, then such a request shall require a Contract Change Request. For avoidance of any doubt, any service, process, function, or responsibility not specifically described herein or the Agreement (and its referenced documents), shall require a Contract Change Request. A Contract Change Request must be agreed upon by the authorized representatives of both parties.

• CyberGrants will occasionally perform system and infrastructure updates and upgrades that require downtime. Notifications for planned downtime are sent two weeks prior to execution, or with best commercial efforts in the case of an emergent situation.

**Advanced Support Consulting and Managed Services**

For fee-based Advanced Support Consulting (“ASC”) for Managed Services, the Client receives regular personalized updates and check-ins from their dedicated support specialist at the beginning of the Client’s contract year. Managed Services are related to the Client’s response to specific questions and requests. In addition to prescheduled Advanced Support phone sessions, ASC or Managed Services packages include additional email support and ad hoc phone calls with a dedicated support specialist. Note: the frequency and availability will vary depending on the ASC package purchased.

With ASC, the designated support or Managed Services package if purchased by the Client, further defined in the Service Level Agreement, will begin approximately ten (10) business days from the start date (“Start Date”) of the Order Form, with a portion of ASC package hours to be
utilized during the implementation phase of the Professional Services. Any purchased but unused ASC package hours will not roll over month to month during the Term of the Order Form.

**ASC Packages**

ASC Packages are described below:

<table>
<thead>
<tr>
<th>Description</th>
<th>Hours Per Month</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASC Silver Package, 12 Hours per year, up to 1 hour per month</td>
<td>1</td>
</tr>
<tr>
<td>ASC Gold Package, 24 Hours per year, up to 2 hours per month</td>
<td>2</td>
</tr>
<tr>
<td>ASC Platinum Package, 48 Hours per year, up to 4 hours per month</td>
<td>4</td>
</tr>
<tr>
<td>ASC Diamond Package, 96 Hours per year, up to 8 hours per month</td>
<td>8</td>
</tr>
<tr>
<td>ASC Diamond Block, 12 Hours per year, up to 1 hour per month (add-on for Diamond Package Only)</td>
<td>1</td>
</tr>
</tbody>
</table>

**Services: CyberGrants Software as a Service**

CyberGrants will provide state-of-the-art software technology in a highly available, highly reliable and highly secure environment that conforms to the requirements of Client. Hosting services will include access to the software, 24 x 7 System monitoring, backups, technical Systems administration, hardware and software upgrades, security monitoring and maintenance, intrusion detection and intrusion prevention. Application hosting services are more completely detailed below.

**Services: Storage Capacity**

CyberGrants shall provide and is responsible for maintaining sufficient storage capacity on servers on which the application is loaded.

There is no limit to the amount of grant and employee giving-related data that Client may wish to store on the CyberGrants servers.

**Services: Guaranteed Bandwidth**

CyberGrants guarantees that the network capacity is sufficient to provide Client and Client nonprofit applicants with full business functionality. Network capacity is reviewed monthly and additional capacity is provided well in advance of any increased usage.
Services: Tape Backup and Recovery

CyberGrants will perform the following type of backups for Client throughout the engagement:

**Online (disk-based) backups:**

- Database backups - Bi-weekly full, daily incremental.
- Application and Operating System backups - Weekly full, daily incremental.
- Continual transaction log backups, encryption, and import into off-site DR system.
- Daily logical database backups (exports)

**Tape backups:**

- Database backups - Bi-weekly full.
- Application and Operating System backups - Weekly full.
- Monthly storage of all tapes off-site in a secure, fire-proof vault

**Services: Data Protection**

CyberGrants will comply and adhere to the requirements set forth in the Agreement as to confidentiality and security of confidential and personal data. In addition, CyberGrants will ensure the security, integrity, and confidentiality of Client data and will protect it against any anticipated threats or hazards to the security or integrity of such data and will protect it against unauthorized access to or use of such data.

A limited amount of personal data is required to utilize CyberGrants Systems. Client is the Data Controller in that Client controls the personal data that is distributed to CyberGrants. CyberGrants is the Data Processor in that CyberGrants only processes and stores data Client authorizes to enter CyberGrants Systems. Client should only distribute the following types of personal data into CyberGrants Systems: name, electronic mailing address, mailing address information for home or business, mail code, business title, department, employee type or status, hire date, employee ID, and manager/hierarchy information. When a Client’s Authorized User accesses CyberGrants systems, CyberGrants may also collect an Internet Protocol (IP) address or similar geolocation information from the Authorized User’s electronic device.

**Services: Security Administration and Monitoring**

Subject to the terms and conditions set forth in the Agreement, CyberGrants maintains rigid security standards and documents these practices in internal policy documents. Change to security based on new threats and known security alerts are deployed on the CyberGrants production environment per industry standards. CyberGrants will take all reasonable precautions to prevent the unintended or malicious loss, destruction, or alteration of Client’s information and other property received and held by CyberGrants in connection with the services in the Agreement. CyberGrants routinely contracts with third party Internet Security vendors to perform penetration and security vulnerability testing in a structured and controlled environment. The results of these tests will be shared with Client upon written request. CyberGrants will monitor the System for performance and any application failure twenty-four (24) hours a day. Monitoring tools are in place on production equipment and thresholds have been established to provide early warning to CyberGrants System administrators. CyberGrants is configured in a highly redundant fashion, and failure on one production server will not preclude or prevent Client from performing...
its daily function in the System. Paging mechanisms are in place to alert Systems administrators of any hardware or software-level failure. CyberGrants will monitor its System and its procedures for security breaches, violations, and suspicious (questionable) activity. This includes suspicious external activity (including unauthorized probes, scans, or break-in attempts). CyberGrants’ production equipment and operational environment is available for physical inspection upon written request.

**Client’s Responsibilities**

While CyberGrants staff will perform much of the configuration, ongoing support and maintenance, the following will be Client’s responsibilities:

- Maintaining Client’s own intranet and equipment used to access the Services provided
- Maintain Client’s own internet bandwidth and reliable connections
- All funding decisions
- Maintaining trained program administrator and a backup
- Timely communication to CyberGrants for pending program changes
- Refer to Client’s own accountant and legal service providers for issues related to whether the Client or grantor is entitled to a tax deduction under their host country’s laws
- Reply to content-related questions deferred to Client by CyberGrants