



Bonterra[™]

CyberGrants[®]

Ongoing Services Descriptions

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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 herein 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

- Instant501(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 **in accordance with the Bonterra Customer Support Service Level Agreement (SLA) available at <https://www.bonterratech.com/legal>.**

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 Bonterra Customer Support team will provide direct support to the Client in accordance with the Bonterra Customer Support Service Level Agreement (SLA) available at <https://www.bonterratech.com/legal>.

The Bonterra Customer Support team is structured to deliver high-quality, consistent service through a collaborative approach that leverages collective expertise to provide timely and effective guidance to the Client.

The following services will be provided by the Bonterra Customer Support team:



- Client Support Portal and Case Management: Clients have access to a support portal where they can request assistance, review case updates, and track issue statuses. Upon contacting Bonterra Customer Support, a case will be created and assigned a unique case number for reference.
- Support Services: The Bonterra Customer Support team provides responsive, knowledgeable assistance to help Clients resolve questions and issues efficiently. The team's focus is on issue identification, troubleshooting, and resolution within the scope defined by the Bonterra Customer Support SLA.
 - The team works with users to understand and resolve reported issues by gathering relevant information, asking clarifying questions, and providing guidance or solutions based on standard product functionality and best practices.
 - Clients can contact Bonterra Customer Support to submit questions, report issues, or request information. Response and resolution times are governed by the applicable SLA.
 - When appropriate, Bonterra Customer Support will collaborate with other internal teams (such as Technical Services, Product, or Disbursements) to ensure comprehensive resolution and communication back to the Client.

Managed Services: Advanced Support Consulting/Technical Account Management

For fee-based Advanced Support Consulting ("ASC") and Technical Account Management ("TAM"), the Client receives regular personalized updates and check-ins from their dedicated support specialist based on the purchased term period. Managed Services are related to the Client's specific requests and/or ongoing deliverables. In addition to prescheduled phone sessions, Success 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 Success Services package purchased.

With Success Services, the designated support or Managed Services package if purchased by the Client, further defined in the Service Level Agreement, will begin approximately fifteen (15) business days from the start date ("Start Date") of the Order Form, where some assistance can be provided during the implementation phase, but can only serve as a client consultant and not replace the Implementation Team resources. ASC/TAM deliverables will not roll over past the contract end/expiry date.

Success Services Packages

ASC / TAM Packages as described in your order or renewal document and [outlined here](#).

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 meets the requirements of the 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 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 comply with the confidentiality and security obligations set forth in the Agreement and the applicable Data Processing Addendum ('DPA'). CyberGrants implements commercially reasonable administrative, technical, and organizational safeguards designed to protect Client Personal Data against unauthorized access, use, or disclosure, consistent with applicable Data Protection Laws and its role as a Processor. 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. The Services require the processing of certain Personal Data as determined and controlled by Client. Typical data elements may include contact and employment-related information necessary to administer Client's programs. The categories of Personal Data processed are more fully described in the DPA, which controls in the event of any inconsistency. 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

- 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