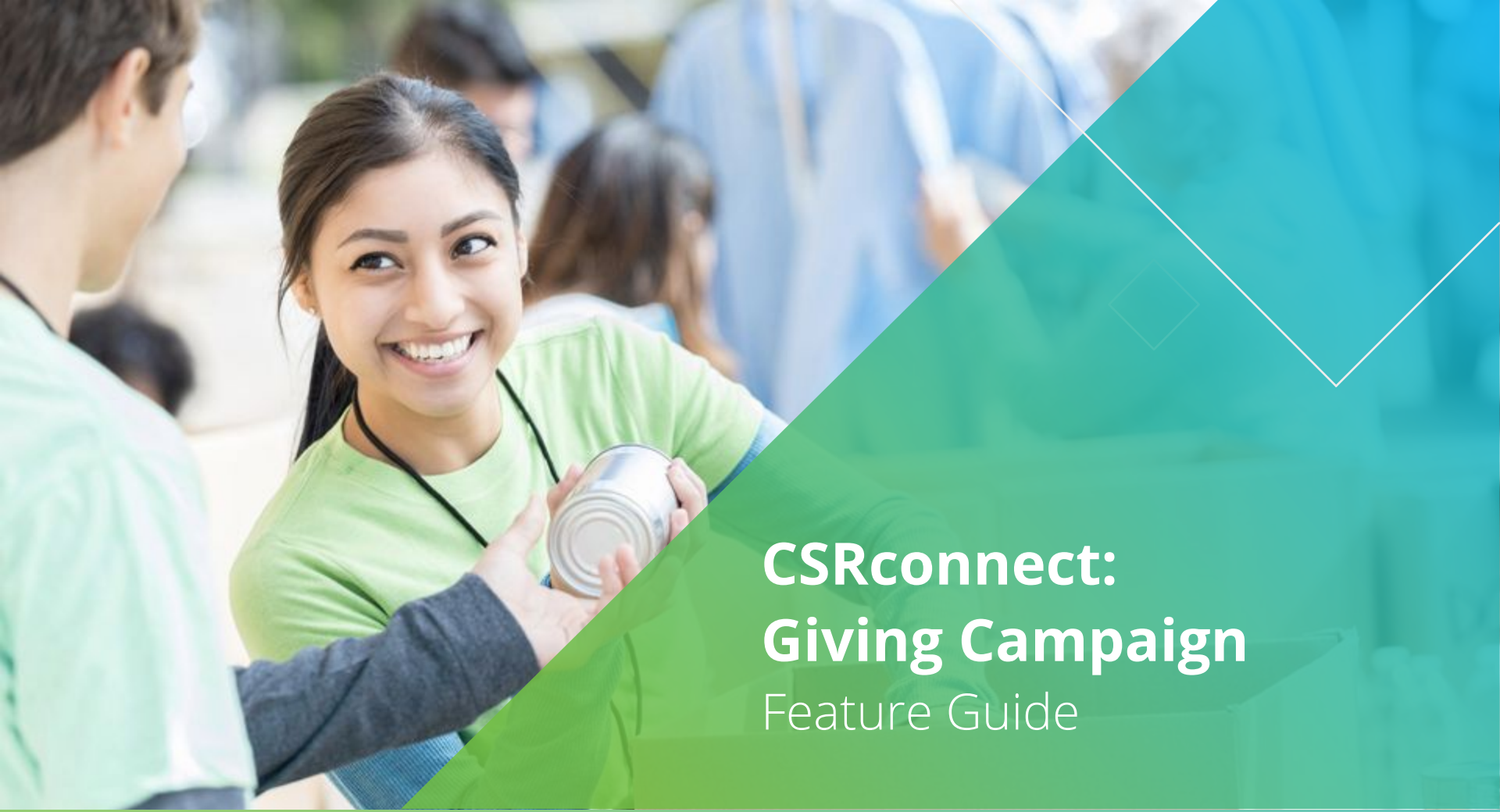
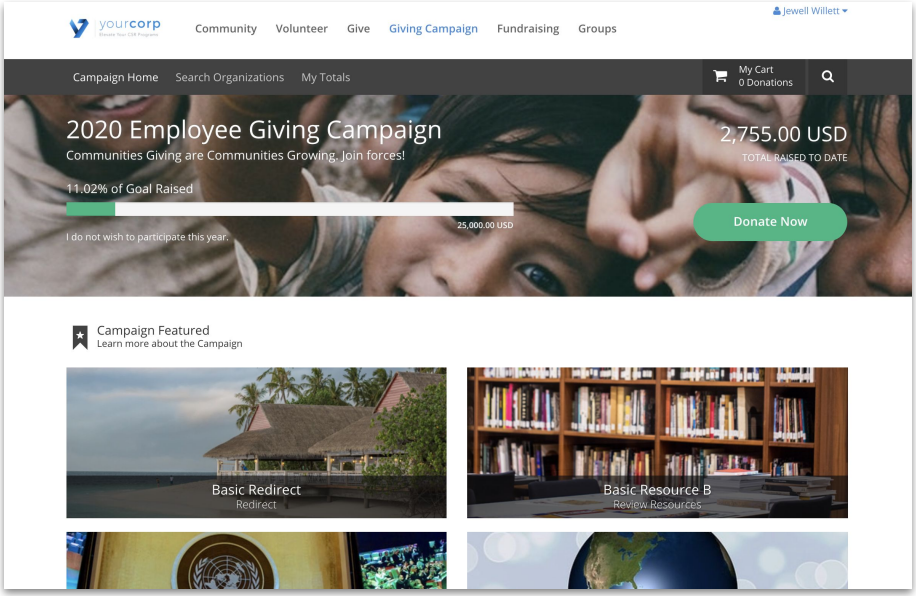


CSRconnect: Giving Campaign

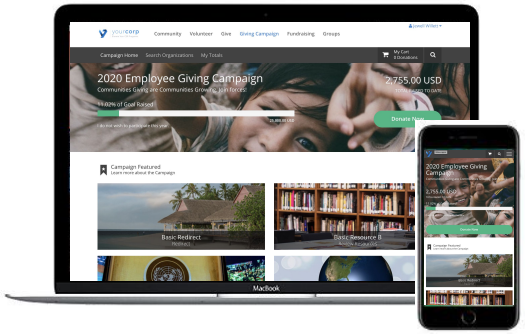
Feature Guide

CSRconnect Giving Campaign

This document includes information on product configurations, donation types, requirements for our workplace Giving Campaign feature.



One Feature.
Many Possibilities.



Campaign Details

- Branding & Design
- Campaign Totals
- Charity Lists

Communication Tools

- Check Out Flow
- Email
- Engagement Elements

Donation Types

- Payroll
- Credit Card
- Offline
- Renew & Rollover
- Donation Features
- Opt-out Options
- Participation Level Programs

Matching Gifts

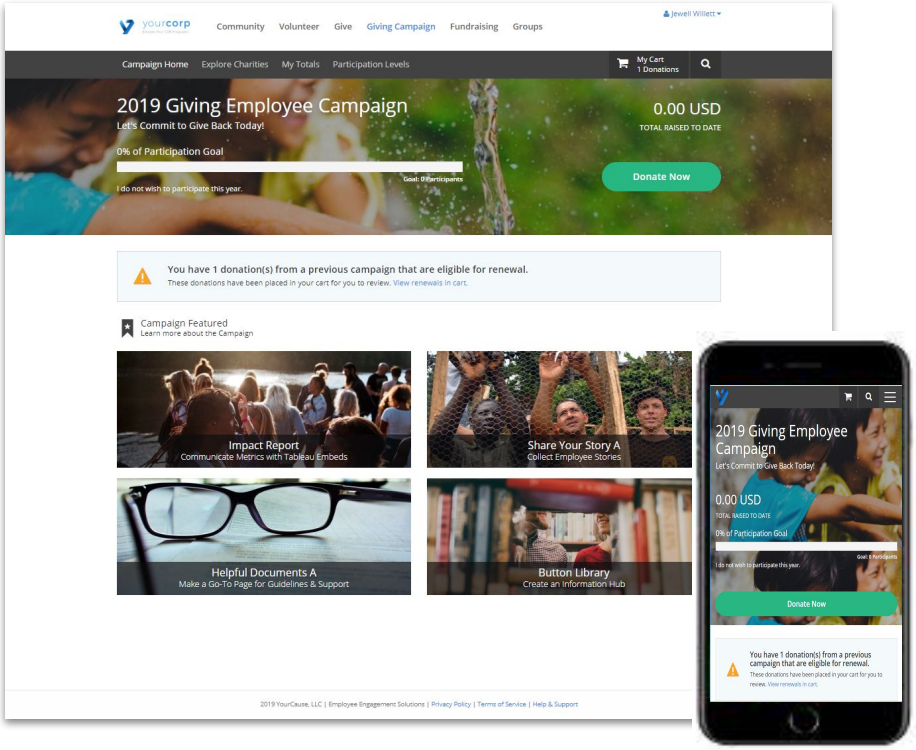
- Matching Types
- Match Settings
- Employee Type & Category
- Charity Options
- Donation Options

Data

- United Way
- Segment-ation
- Reporting
- Record a Fundraiser

Giving Campaign Details

- ❑ Branding
- ❑ Login & Community Access
- ❑ Campaign Totals & Goals
- ❑ Campaign Splash Page
- ❑ Charity List Configuration



**Example of a campaign home page with total raised, goal amount, Do Not Participate, and manual renew*

Campaign Branding

(1) Campaign Name

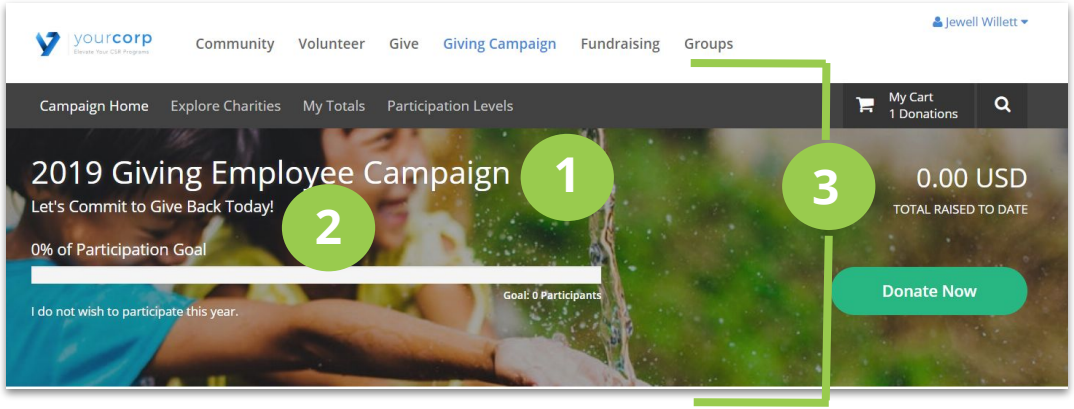
This name is seen on the campaign homepage, reports and back-end historical data. **Required. 35 characters.*

(2) Call to Action

The subtitle can extend on the campaign's purpose. **Required. 60 characters.*

(3) Campaign Header Image

A colorful or dark image is recommended because the standard text is white. **Required. 1440 x 600 px. Slight grey overlay/gradient from the bottom up is included by default.*



Start Date / End Date

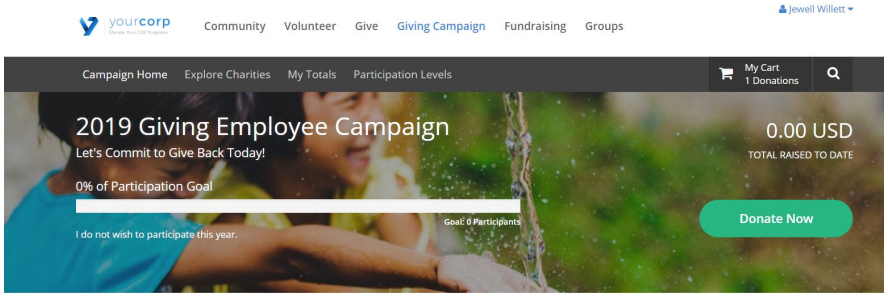
The campaign dates that are selected determine when the campaign will be available in the community. If the campaign feature is activated outside of the date range, users will receive a message, "There is no active campaign at this time." **Dates are required.*

Login & Community

When the Campaign feature is activated, it becomes a part of the top navigation bar. While activated, campaign can be accessed at any time through the top nav link. In addition, there are a series of options for navigating users to the Campaign Home:

(1) Redirect to Campaign Home

If selected, users will immediately land on the Campaign Home page instead of Community Home when they first login. *Optional*



Campaign Home

(2) Community Home Takeover

If selected, users will land on Community Home, but the Campaign Header Image will replace the home page dashboard. *Optional*



Community Home Takeover

Note: Both choices are optional, and can be used together for maximum Campaign exposure

Totals & Goals

$ Amount or Participation %

(1) Goal Raised by %
A % of goal raised tracker can be activated for the campaign. *Optional*

(2) Goal Amount
A total goal dollar amount to be raised can be set for the campaign. *Optional*

Or

(1) Participation Goal by %
A % of participation goal tracker can be activated for the campaign. *Optional*

(2) Total Participants
A total number of Participants number can be set for the campaign. *Optional*



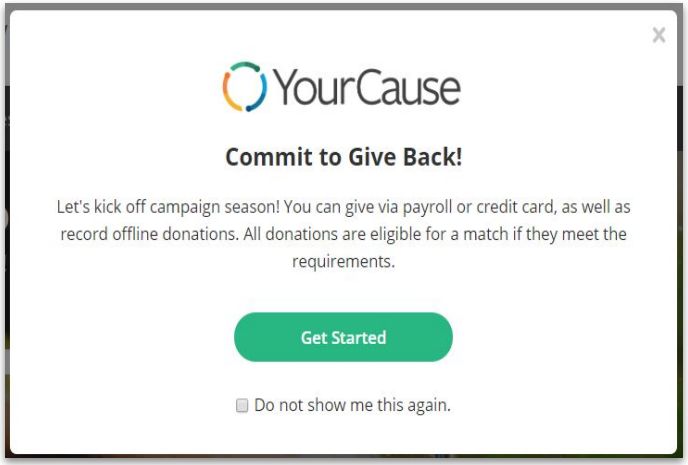


Campaign Splash Modal

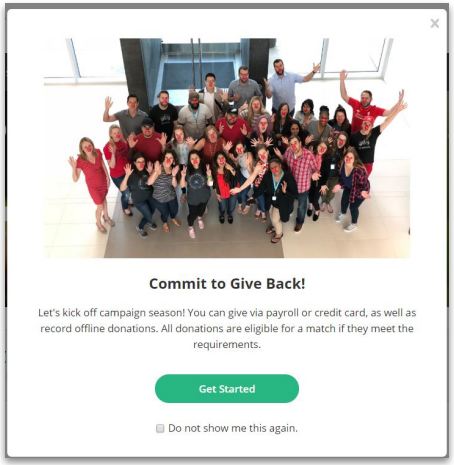
A customizable Splash Modal (pop-up) can be added when landing on the Campaign Home page. This optional feature allows the mission of a campaign to be advertised..

Feature Requirements:

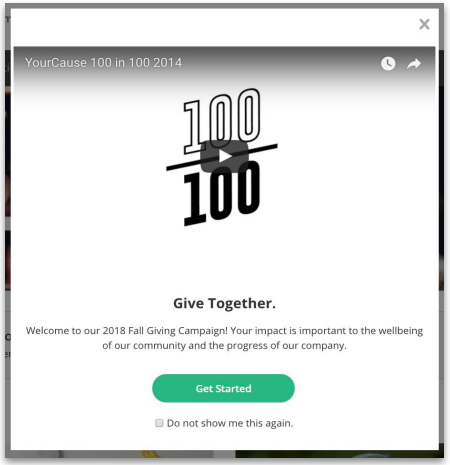
1. **Header:** *45 characters or less*
2. **Body Text:** No character limit, although just a few sentences is best
3. **Top Feature:** Can be any one of the following (*1) client logo, (2) an image, (3) video*
4. **Frequency: Recurring** (every time they return to the home page) or **once upon first login** (optional)



Client Logo



Image



Video

Charity Lists

All Charities

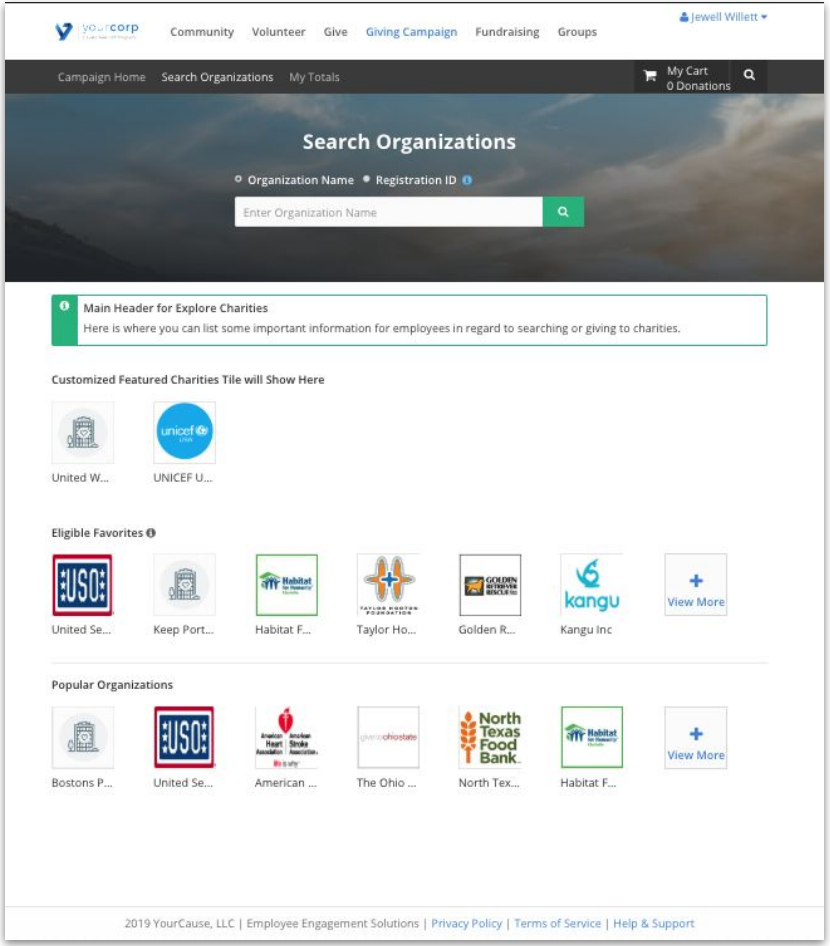
Featuring all charities allows users to search through all eligible charities in the community for their campaign pledges. The Explore Charities page consists of:

General Search: Through the general search, users receive results for keyword and Registration ID searches, and can narrow down by location filters.

Featured Charities *(Optional)*: If selected, can feature up to 25 charities for your users to select from. This section can have a custom header. **If you choose to 'pre-populate local United Way' it will appear in Featured Charities.*

Favorite Charities: As the user moves through the donation flow and search they have the ability to add charities to their favorites. Those charities can be managed in My Account.

Popular Charities: Scroll through the most popular charities in the community, based off frequency of donation.



Charity Lists

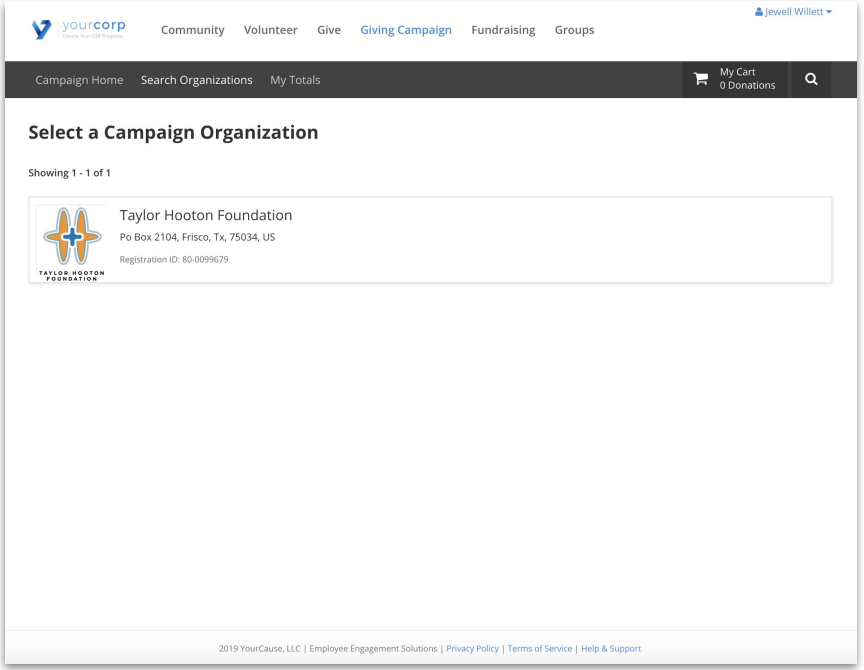
Limited Charities

Can be used to drive pledge traffic to a specific set of charities by featuring up to 50 Registration IDs. Here are some notes about choosing this feature:

Explore Charities: While in the campaign flow, the general search is disabled. The user can only scroll through the chosen EINs featured in Explore Charities.

Favorite Charities: While in campaign flow, the user cannot see or choose from their favorite charities. However, if they give to a EIN on the set list it will save into their favorites under My Account.

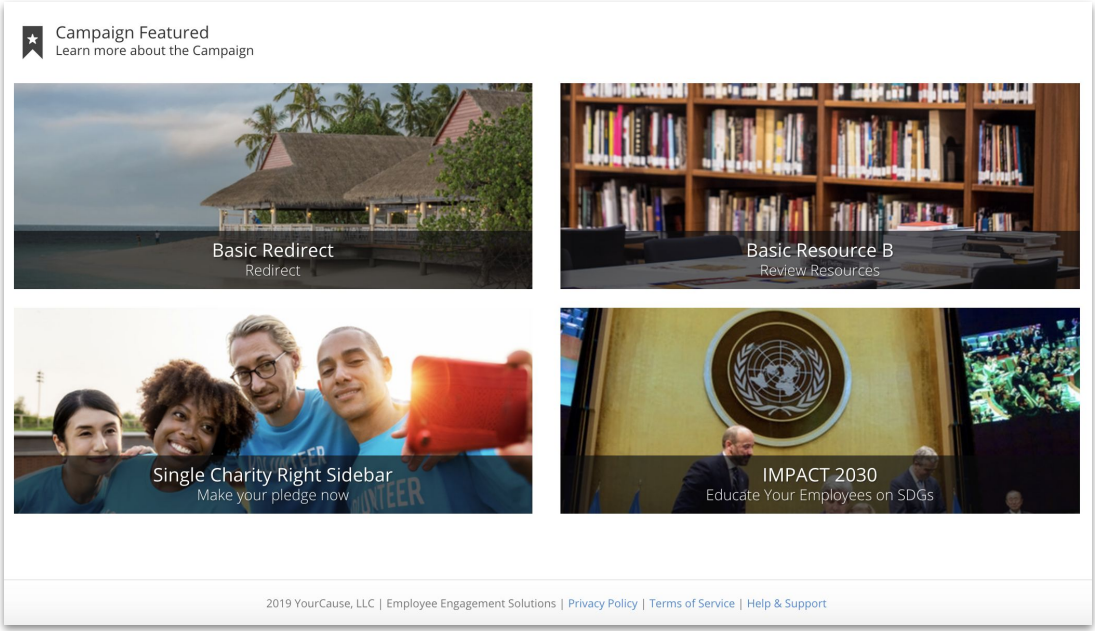
Popular Charities: There is no access to Popular Charities when using a *Limited Charity List* for campaign.




YourCause
COMMUNICATION TOOLS
How to Communicate Campaign Information

Engagement Elements

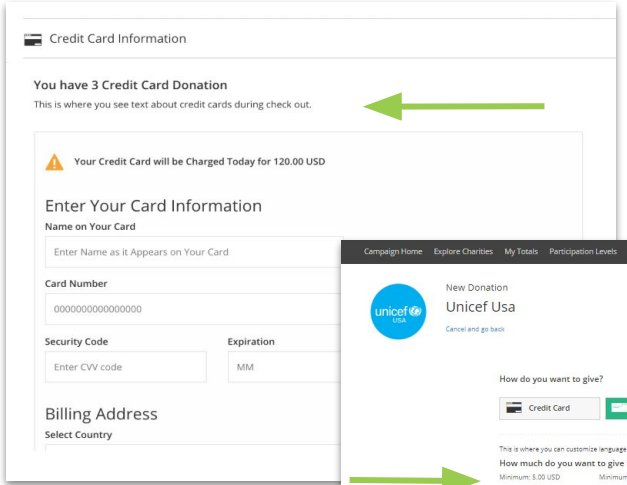
The Campaign can feature different EE's than the Community Home, allowing Campaign communications, programs, and resources to be customized.



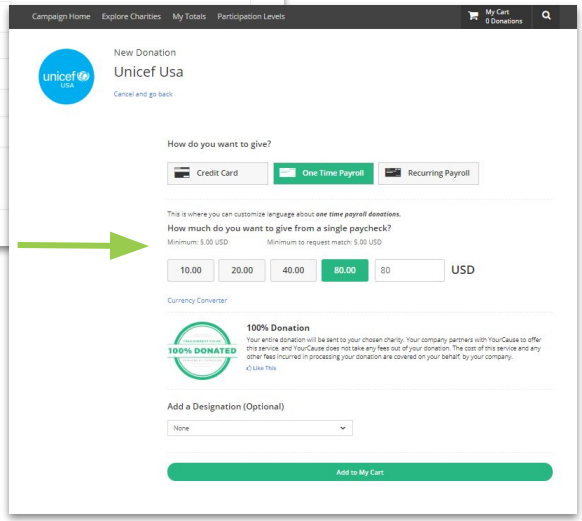
Custom Text

During the campaign checkout flow there are eight areas where custom messages can be placed. The text can be formatted and include hyperlinks as needed. Areas with custom text:

- ❑ Before Confirming Donations in Checkout
- ❑ After Confirming Donations in Checkout
- ❑ Credit Card Explanation During Checkout
- ❑ Added to Cart Reminder Message
- ❑ Offline/Direct Donation Explanation Text
- ❑ One Time Payroll Donation Explanation Text
- ❑ Recurring Payroll Donation Explanation Text
- ❑ Credit Card Donation Explanation
- ❑ Cart Donation Confirmation Email Text



Example of Credit Card Explanation Text



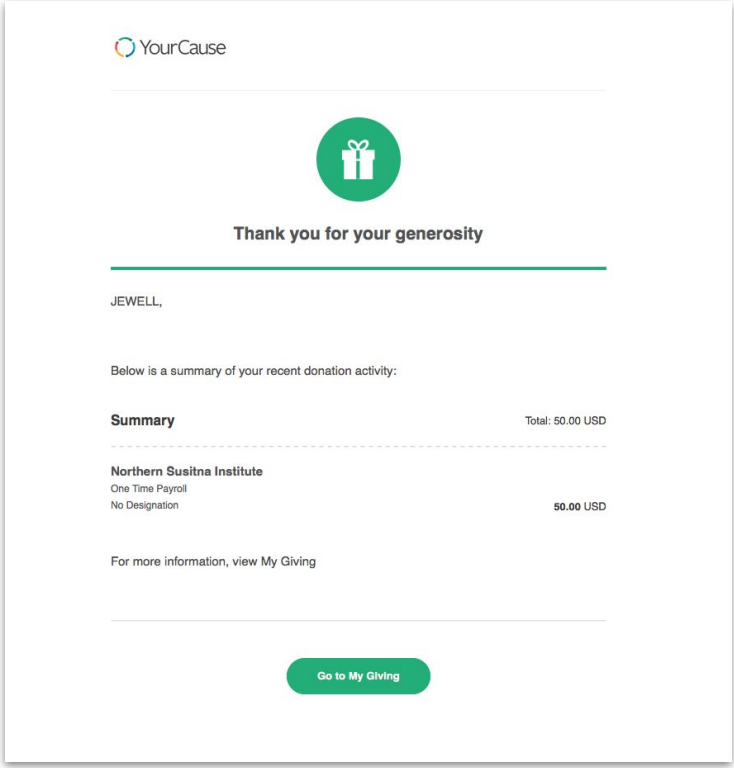
Example of One Time Payroll Explanation Text

Confirmation Email

Custom text can be added to the email that is sent to users after each campaign check out. This can be used to thank users, or direct them to another action like a survey.

This email can be formatted and include hyperlinks.

Note: The subject line is standard text, only the body text of the email is customizable.



Example default Campaign confirmation email



DONATION TYPES

How Users Donate Through the Campaign

Donation Types

Several donation types can be chosen, including: credit card, one time payroll, recurring payroll, and offline/direct donations:

Credit Card

Employees can pledge via personal credit card in real-time.

One-time Payroll

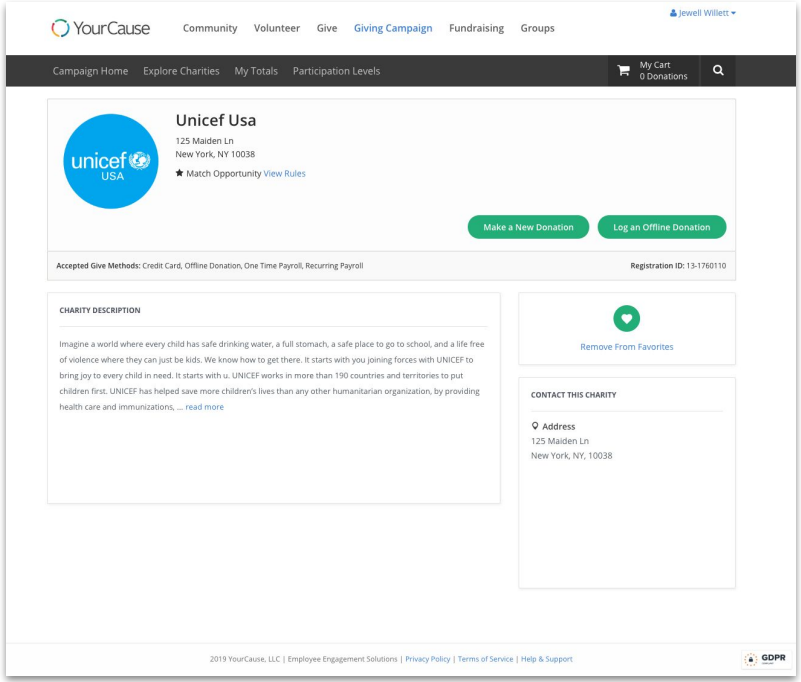
Employees can pledge one-time from a designated pay period, usually the first pay period of the following calendar year.

Recurring Payroll

Employees can pledge a single amount to recur each pay period.

Offline/Direct Donation

Employees can pledge-to, or record a donation made outside the platform. This record can count toward participation goals and/or matching.



The first step of the Campaign is to choose how you will donate via the charity page.

Credit Card Pledges

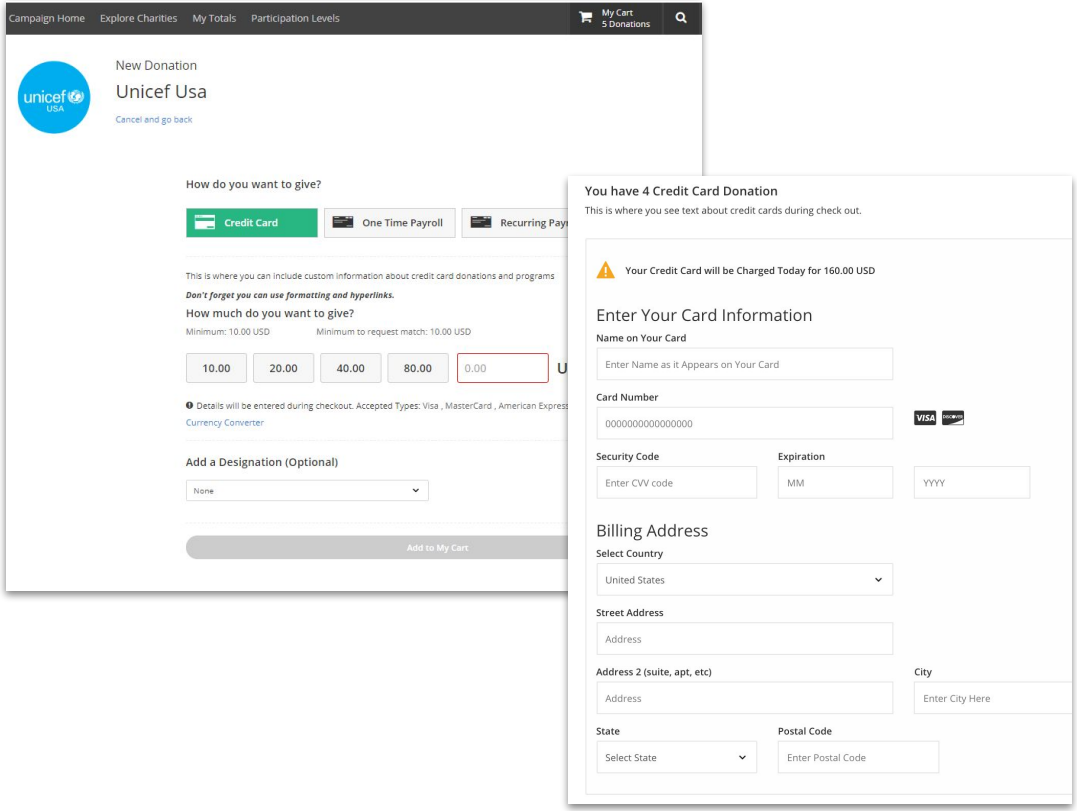
Credit Card pledges are charged to the employee's personal credit card in real time. The following details are customizable:

Credit Card Minimum Amount

The minimum must be at least $10.00.

Credit Card Types

Choose which credit card types are allowed in the community: Visa, MC, AMEX and Discover.



Payroll Pledges

Payroll Project Settings

One Time Min/Max Deduction

Set the minimum and maximum dollar amount an employee can donate for their single paycheck. A maximum one time deduction amount is not required.

Recurring Min/Max Deduction

Set the minimum and maximum dollar amount an employee can donate per paycheck. A maximum one time deduction amount is not required.

Campaign Settings

Minimum Display Prompt

(1) **Minimum:** Minimum amount required to make the payroll pledge.

(2) **Prompts:** These amounts give users a preset amount that increases by a 100% in each preceding box. Most Clients use this to drive a minimum participation amount, or reflect a minimum starting match amount.



Example of a one time payroll flow, with a Payroll minimum of $1.00 and a minimum Display Prompt of $20.00, which matches the pledge prompt of $20.00

Offline/Direct Pledges

Offline pledges create an opportunity to capture collective impact in the community. The user is entering information about a donation made out of the system so that critical information can be captured for match verification or to increase participation:

Date Range

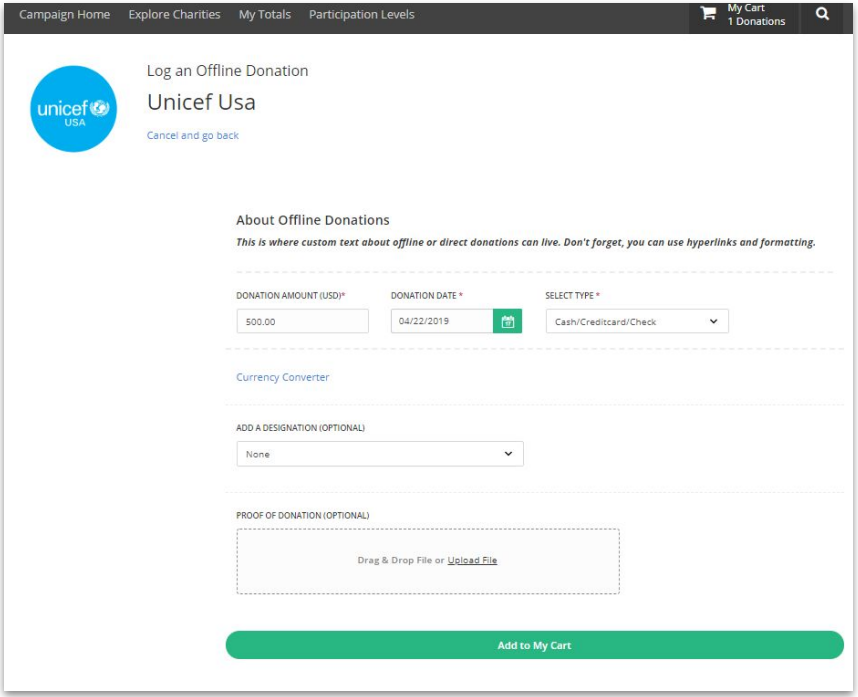
Set a custom date range of eligible Offline donations to be included in the campaign. If no date range is set, the employee will not be able to record a date in the future.

Receipt Upload

Encourage employees to upload a copy of their donation receipt. This feature can be optional, required, or turned off, and can be set with a custom name.

Offline Donation Types

Customize the Offline donation types to fit your program and reporting needs. *EXAMPLE: Check, Credit Card, Cash, Stock*



Pledge Renew/Rollover

There are several options for renewing past pledges, or automatically rolling over past pledges into a new year of giving:

Do Not Show Past Pledges

The Renew & Rollover features are optional.

Manual Renew

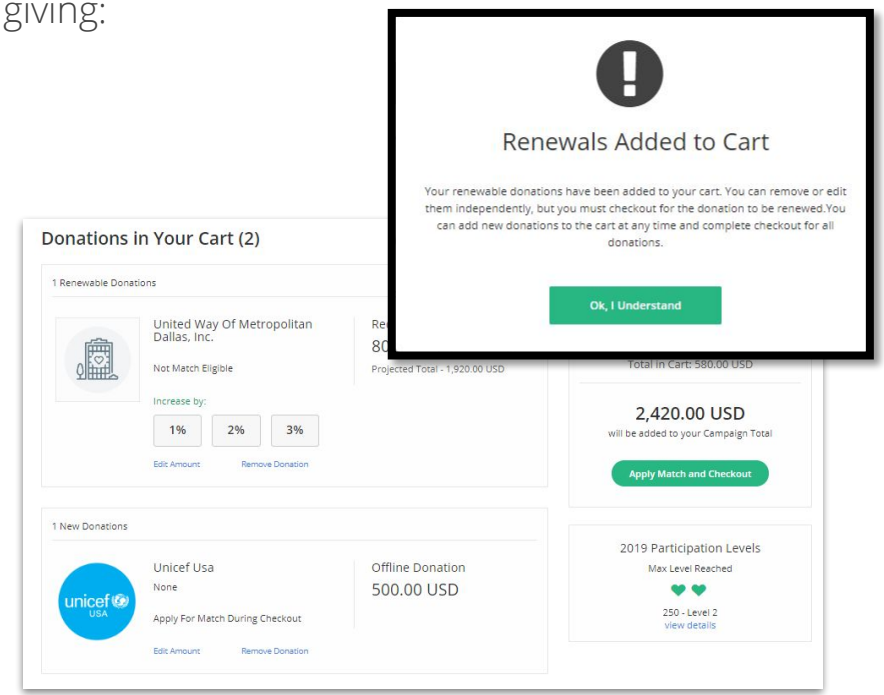
If the previous year's charity and/or pledge is still active, a user will have the pledge pre-loaded into their cart, ready for check out.

- You can activate a prompt to increase a pledge by three custom percentages. This takes place in the checkout process. The employee can also remove unwanted pledges.

Automatic Rollover

You can opt to rollover employees active, past-pledges on a specific date. If this option is selected identify the following:

- Rollover One-time payroll (optional)
- Rollover Date
- Rollover Email Reminder Date
- Rollover Email Text



NOTE: Clients can choose either Renew OR Rollover, not both.

Pledge Renew/Rollover

Additional notes and information

Manual Renew

If the employee never logs into the campaign, their donation(s) will automatically deactivate at the end of the current payroll program; they will not continue on into the next payroll program - or year.

Eligible Donation Types: Credit Card, One Time Payroll, and Recurring Payroll

Automatic Rollover

If the employee never logs into the campaign, their donation(s) will continue into the new payroll program - or year.

Eligible Donation Types: One-time Payroll and Recurring Payroll. NOTE: One-time payroll is optional and must be selected

User Choice/Evergreen Payroll

If active, users can proactively opt-in to ongoing payroll on a pledge-by-pledge basis. If they opt-in, they will automatically be rolled over year after year.

Technical Notes

In order to use Rollover or Renew, there must be an 'archived campaign' that links to the new campaign. This means it's traditionally a setting for clients that have run at least one campaign with CSRconnect.

For both Rollover and Renew, previous pledges are pre-loaded into the campaign cart and the user can edit or remove the pledges before the campaign is complete.

NOTE: *Rollover requires support from the Engineering team and will be coordinated by your Account Manager.*

Donation Features

Additional features for donation and pledge management.

Donation Limits

A maximum number of pledges per user. You must set at least '0':

For Example: You can limit users to make only 3 pledges during a campaign.

Edit Pledge Restrictions

The ability of the user to edit donations after a set date can be restricted. If the 'edit restriction date' is past the Campaign end-date the employee will make edits through My Giving. Once the 'edit restriction date' passes, the employee will not have access to an 'Edit' button in My Giving.

Campaign Totals Display

For recurring payroll, the total amount of the donation in a specific period can be projected:

For Example: 1/1/20 - 12/31/20 will display the total pledge amount for the next calendar year.

Do Not Wish to Participate

An optional 'I do not want to participate' link can be displayed. If clicked, the user will not proceed with checking out anything in their campaign cart, and their action is captured in reporting.

**Employees receive a confirmation email after opting out. This email is not customizable.*

Participation Levels

Different levels of employee giving can be recognized by using the Participation Levels feature.

Program Details

Display dates, program name, icon, calculation, and description can be customized.

Levels

Levels are unique per community and up to 20 levels can be created. Details include:

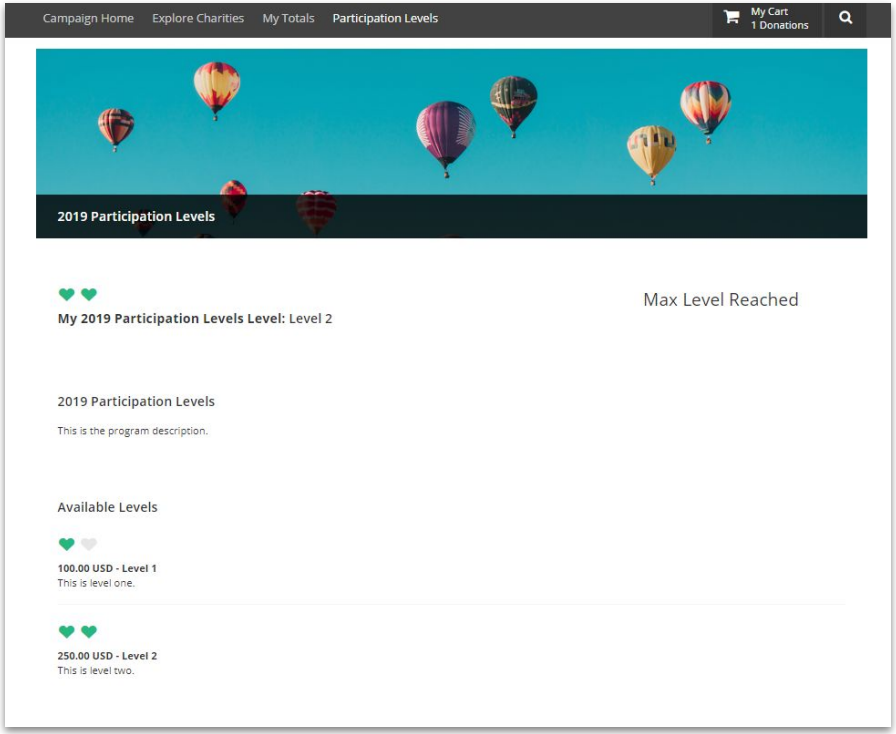
- Level Name, dollar amount for achievement, and description details

Calculations

Display Date Range: This date range determines:

- Display in the user interface
- Active Credit Card & Offline donations pulled into the calculations

Recurring Payroll Date Range: This date range determines: payroll donation eligibility in the calculations




YourCause
CAMPAIGN MATCHING
Attaching incentive to the campaign

Matching Donation Options

Donation parameters for each match program can be customized. This allows for the opportunity to further tailor a matching program to fit missions and/or guidelines.

Matching Percentage

Select the match percentage for qualifying donations.

EXAMPLE: Match donations 2:1 (200%), 1:1 (100%, match ½ of the donation amount (50%)

One Time Payroll Options

One Time Minimum Match Request Amount: This is the minimum one time amount the employee must give per transaction to be prompted for a match.

EXAMPLE: The minimum to donate in campaign is $10.00 one time, but the donation to receive a match must be at least $25.

Match Minimum

Select the minimum donation amount eligible for a match.

Recurring Payroll Options

Recurring Minimum Match Request Amount Per Paycheck: This is the minimum per check amount the employee must give *per transaction* to be prompted for a match.
EXAMPLE: The minimum to donate in campaign is $1.00/paycheck, but the donation must be at least $3/paycheck to be prompted to receive a match.

Recurring Minimum Match Request Amount in Total: This is the minimum amount the employee must give in total by the end of the match program.
EXAMPLE: The minimum match in total is $75. If the user schedules $15 recurring with 5 pay periods left ($15x5 = $75), they will be prompted for the match.

Matching Types

There are several matching types during campaign to choose from:

Credit Card Matching

Users can make direct Credit Card donations through the campaign, and receive a Match when the pledge meets the minimum requirements.

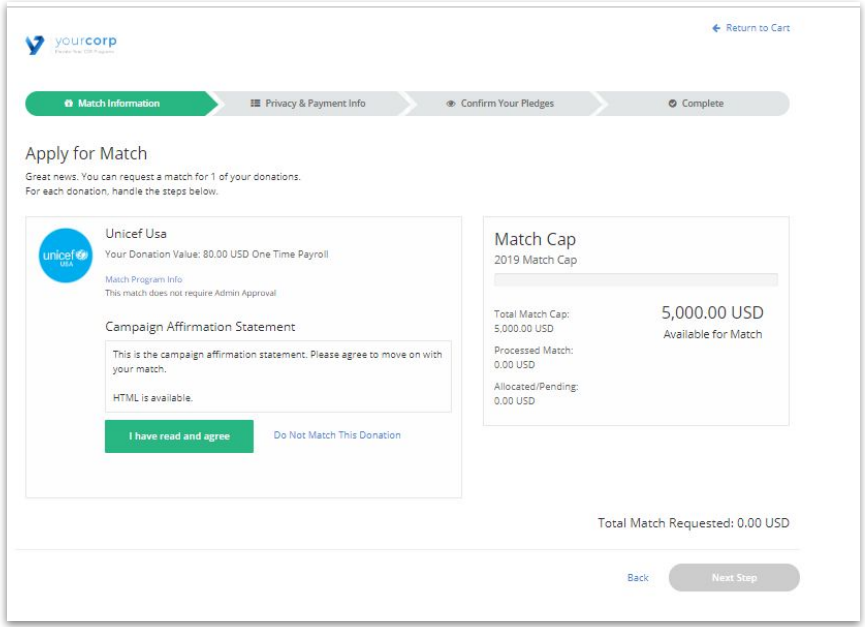
Payroll Matching

Users can receive matches through one time and/or Recurring payroll deductions. When the scheduled pledge meets the minimum, it is eligible for the match.

NOTE: For recurring matches, the total deduction in the payroll project time frame must meet the set minimum.

Offline Matching

Users can receive matches for donations made outside of the community. Typically the Offline donation types are Check, Cash & Stock. You also have the ability to add custom Offline donation types to meet matching requirements. If needed, Offline matches can require Admin Approval as well as NPO verification of dollars.



Match Settings

Settings (or match caps) can be setup to control the dollar amount match allowed per employee. Once an employee has allocated all of their matching dollars allowed, they will no longer be prompted to apply for a match.

Match Setting Name

The name of the match cap will be displayed within the pledge flow as well as within reporting.

EXAMPLE: 2018 YourCause Matching Program

Currency Code

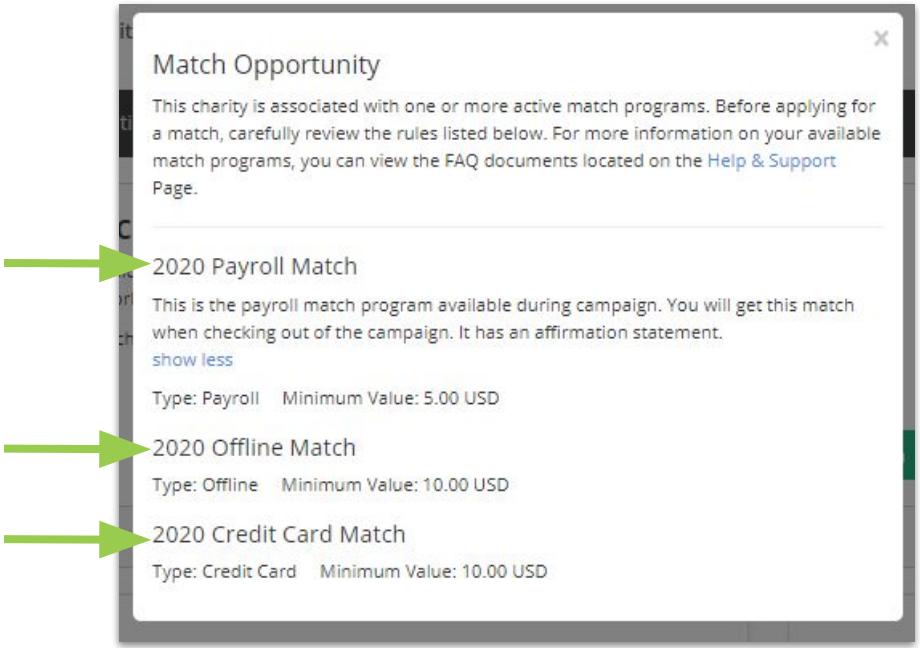
Multiple match settings can be created if there are different match caps for each currency.

EXAMPLE: $1000 USD match cap for US employees and 2000 CAD match cap for Canada employees

Match Amount/Threshold

Multiple match settings can be created if there are different match caps needed for various programs.

EXAMPLE: $1000 USD match cap for retirees and $2000 match cap for full-time employees



Matching by Employee Category & Type

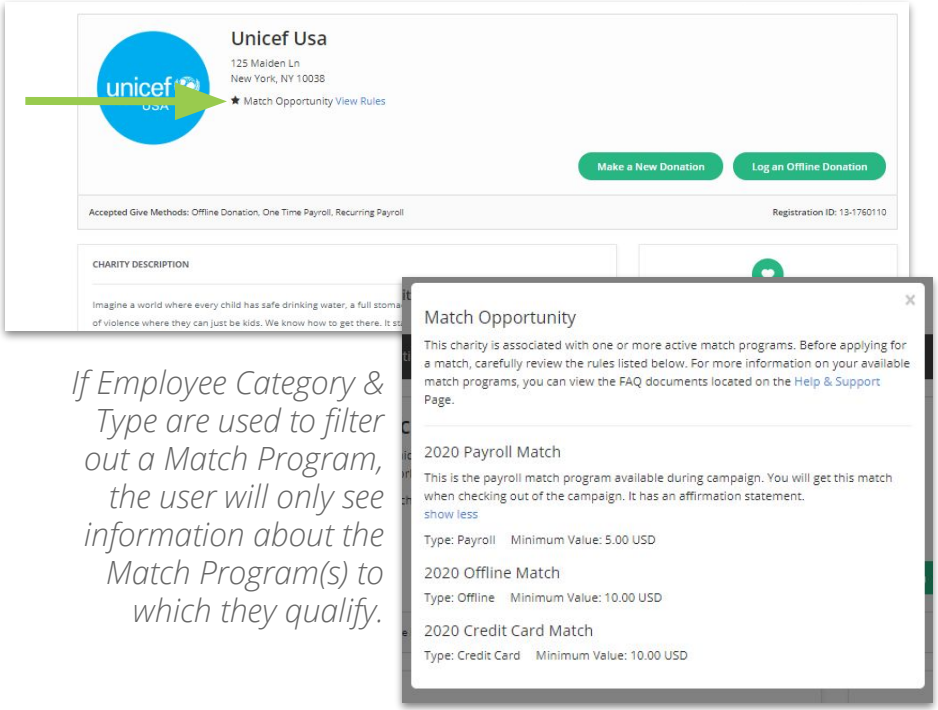
Based on the information included in the HR file, we can create multiple match programs based on the employee. Below are the items that can be filtered out for multiple programs.

Employee Type
FOR EXAMPLE: Full-time, Contractor, Intern, Retiree

Employee Business Unit
FOR EXAMPLE: Accounting, Sales, Marketing, etc.

Employee Country
FOR EXAMPLE: USA, Canada, India, etc.

Custom:
There are 3 HR file values that can be customized and used toward filtering match settings (caps). If Custom 1, 2 or 3 is not being used HR file can be updated through an Implementation Request Form/Project, but allow plenty of time to achieve this change.



If Employee Category & Type are used to filter out a Match Program, the user will only see information about the Match Program(s) to which they qualify.

Additional Vetting

Vetting parameters for each match program can be customized. This allows for the opportunity to further tailor a matching program to fit a mission and/or set of guidelines.

YC Admin Approval

Requires approval from the client admin side. This can be the client or our Program Services team (for an additional fee). Admin has the ability to Approve/Deny/Re-submit match requests.

Match Affirmation Statement

Prompt the user to affirm/deny an affirmation statement about the match. Different affirmation statements can be applied to each match program. If the user does not affirm, they will continue with the match allocation. **The statement needs to be an 'I agree/I disagree' statement*

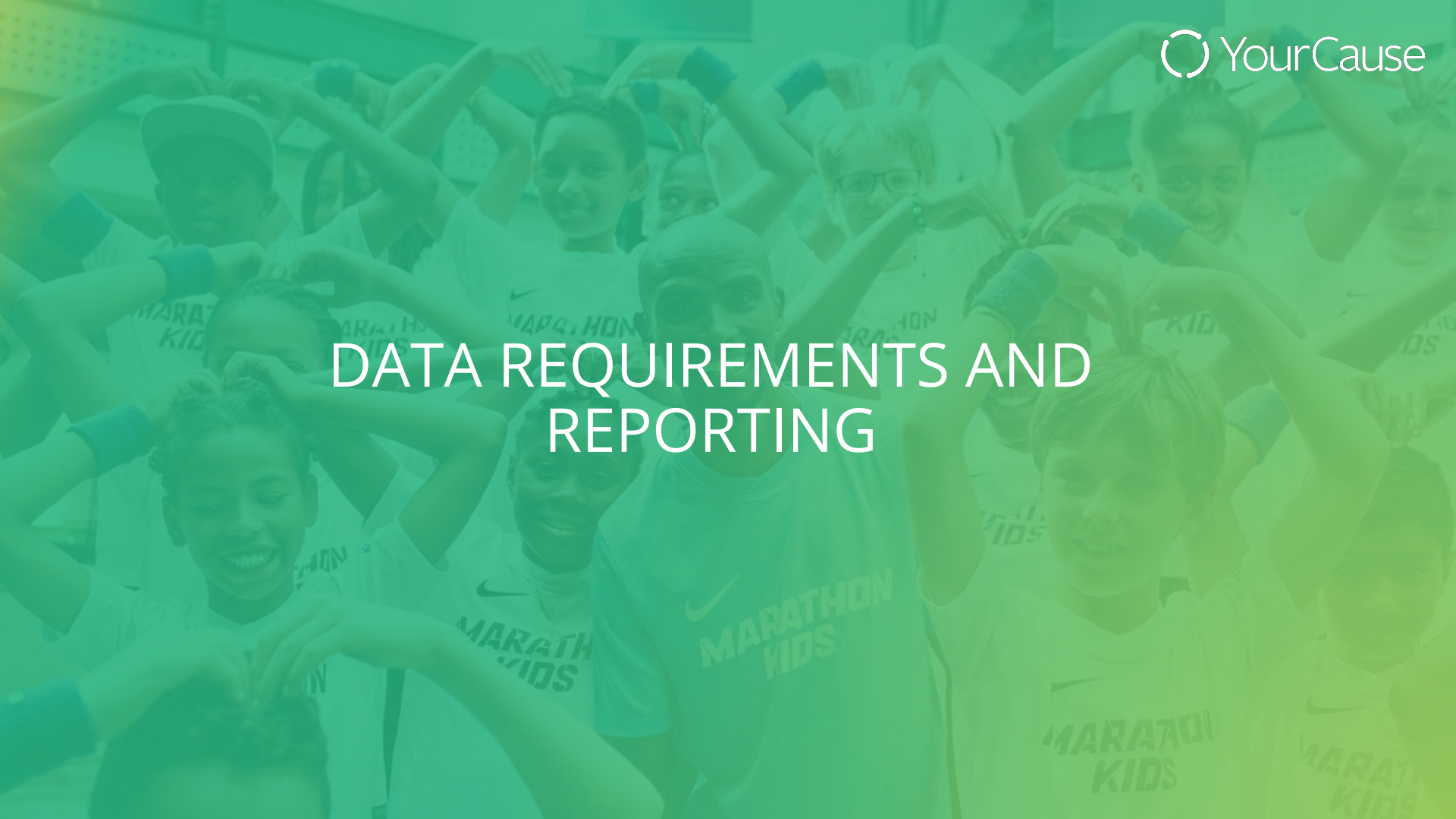
Need Charity Admin Approval

For Offline pledges only, a charity admin must verify receipt of the original donation through the NPO portal before the match is approved. Clients can choose when this is required:

- Always
- When the donation is a minimum amount
- If there is no receipt attached

Custom Questions

In addition to the Affirmation Statement, clients can attach unlimited questions that must be answered before moving forward with match allocation. They can be formatted with drop down and text fields to suit unique needs.


YourCause
DATA REQUIREMENTS AND REPORTING

Campaign Tracker

The Campaign Tracker allows a snapshot of the Giving Campaign to be viewed. After setting specific goals, Program Administrators can track progress through percentages, charts, and graphs. These high-level details can be compared to historical data.

Data

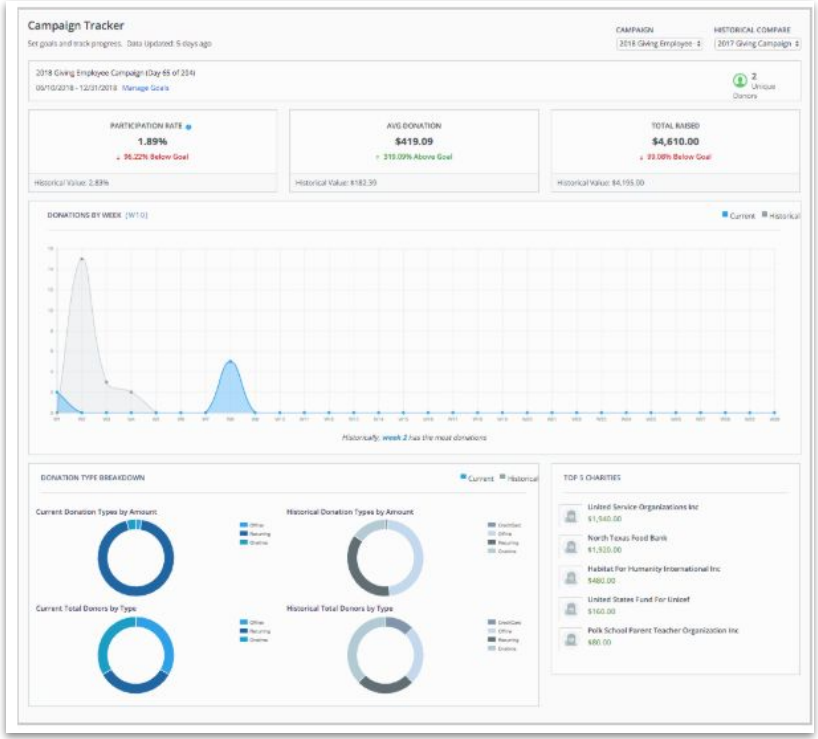
Once goals are set, the following data can be viewed as it's updated approximate once each hour.

- Participation Rate
- Average Donation Amount
- Total Raised
- Donation by Week Graph
- Donation Type Breakdown
- Charity Information

Permissions

The Campaign Tracker is viewed in the Client Admin Panel under Dashboards. Permissions can be given to different users to be able to view the Campaign Tracker.

**Applicable to all Giving Campaign clients*



Data Requirements

Each campaign is unique based off the various features that are implemented, so it is important to make sure that all technical needs are accommodated for:

*Payroll Projects

Each Campaign is tied to a Payroll Project that determines how campaign totals are calculated.

Details include: Name, date range for deductions, minimum payroll amount, minimum recurring payroll amount, and employee type. **There can be only one active payroll project per employee type.*

United Way

YourCause supports United Way Campaign clients with the following details:

- Gift Link File sync
- Pre-populated local United Way
- Pre-loaded focus area designations to each UW on the gift link file
- UW Where Raised Report (by request only)

Review our United Way Workplace Giving Campaign Decision Guide for more details.

**Applicable to all Giving Campaign clients*

Segmentation

Campaigns can be created for each segment. If segmentation has not been used before, this can be initiated by assigning HR file filters and building the necessary segments.

EXAMPLE: Full-time employee segment has campaign active, but the Retiree segment does not have campaign active.

*Campaign Reporting

In addition to Ad Hoc reporting, YourCause offers five standard campaign reports that must be activated before the start of the campaign:

- Individual Report
- Transactional Report
- Charity Report
- Geographical Report
- Business Unit Report

Additional reports include: Record a Fundraiser & the United Way Where Raised Report

Record a Fundraiser

The Record a Fundraiser feature (RAF) can be used to capture fundraising directly to a charity. This feature allows for the capture of critical participation data and accommodates for dollars that might be collected and donated offline by a group of employees.

Accessing the RAF Feature

The RAF feature is accessed via direct link. This link can be included through various communication tools offered in the campaign/community home. EXAMPLE: Record a Fundraiser EE.

RAF Details

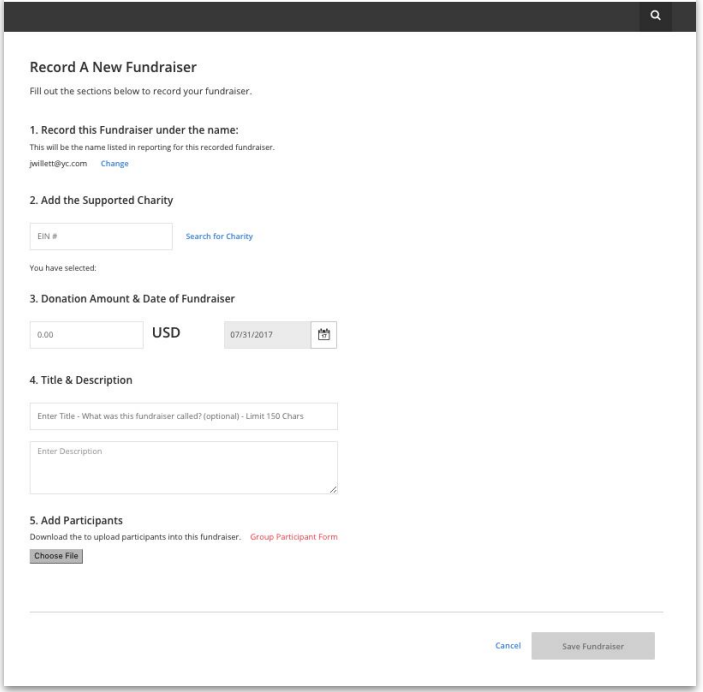
The feature captures dollar amount raised, date, title, fundraiser description and participations. Participants are loaded by employee ID.

Reporting

Fundraising data (via the Record a Fundraiser tool) can be viewed in several ways:

- Campaign Transactional Report
- Fundraising Report
- Fundraising Detail Report
- Ad Hoc Reporting

**All reports must be activated*



Campaign Checklist

Feature Breakdown *denotes a required field

- [ ] *Campaign Name
- [ ] *Campaign Call to Action
- [ ] *Campaign Header Image
- [ ] *Start Date / End Date
- [ ] *Main Image
- [ ] Show total raised on home
- [ ] Show $ Raised Goal & Progress
  Or
- [ ] Show Participation % & Progress
- [ ] *Donation Types
- [ ] Campaign Matching
- [ ] Donation limits
- [ ] Edit Campaign Restrictions
- [ ] Charity List: All or Limit EINs
- [ ] Login Configurations
- [ ] Campaign Splash Modal
- [ ] Campaign Engagement Elements
- [ ] Manual Renew Or Rollover
- [ ] Campaign Total Display
- [ ] Donation Confirmation Email
- [ ] Do Not Wish to Participate option
- [ ] Participation Level Program
- [ ] Custom Text
- [ ] Record a Fundraiser

Technical Checklist:

- [ ] Historical data import
  (first time client and/or renewal import)
- [ ] United Way Gift Link File
- [ ] *Payroll Project Set Up
- [ ] Reporting Considerations
  (Where Raised, Standard Campaign, Updates to Custom)


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