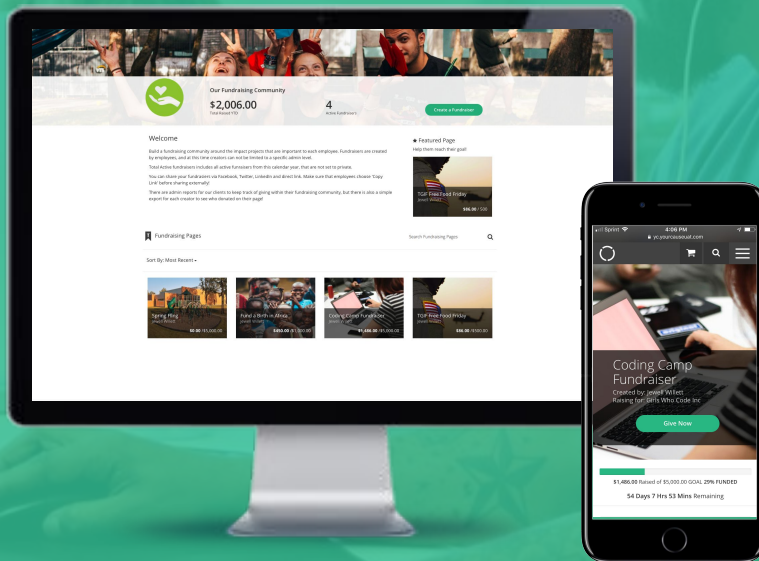




CSRconnect: Peer to Peer Fundraising Feature Guide

PEER TO PEER FUNDRAISING

Our Peer to Peer Fundraising (P2P) feature allows employees to fundraise for eligible charities internally and externally. The mobile responsive crowdfunding environment is a unique way to engage employees and support their passions within your corporate giving programs.



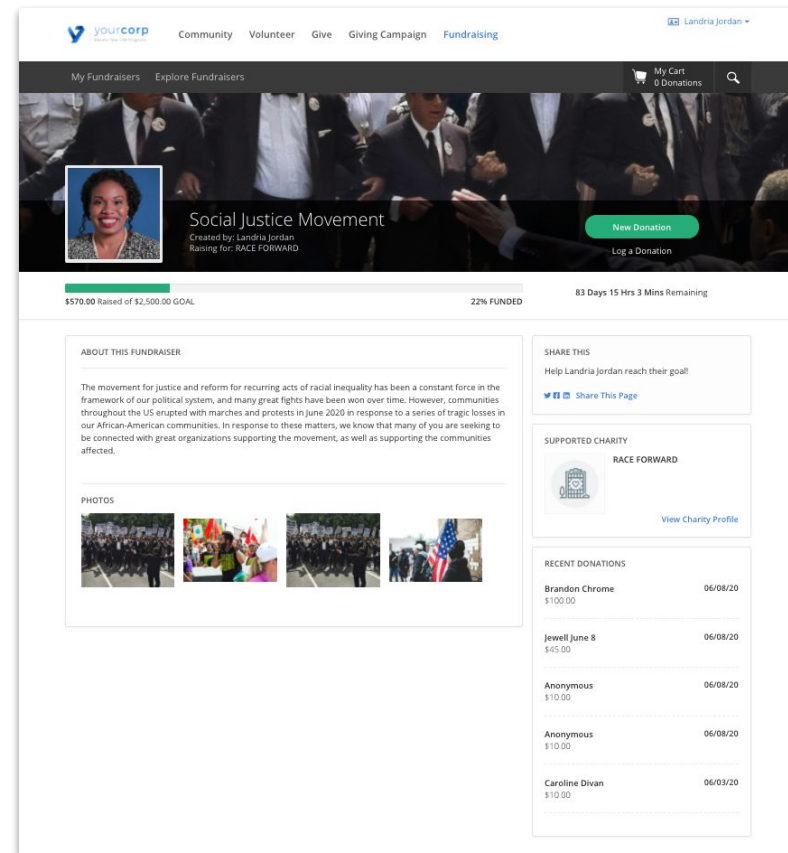


Feature Highlights

About Peer to Peer Fundraising

Feature Highlights

1. **Fundraising Community:** A branded landing page that features all active fundraisers (except those marked private).
2. **Fundraising Page:** Each fundraiser has its own page, with custom content, a donation flow, and donation tracking.
3. **My Fundraisers:** A personal dashboard to manage all of the fundraisers an individual has created.
4. **Internal vs. External Sharing Options:** P2P Fundraising communities can be set up to allow users to share fundraisers outside of the organization via a public link on select social media platforms.
 - o *To activate External Sharing Options, you must activate Social Sharing and select at least one Social Media platform: Twitter, Facebook, LinkedIn*
5. **Disclaimers and Custom Messaging:** The Fundraising community can include information and disclaimers that convey your company's message regarding P2P Fundraising throughout the feature.
6. **Reporting:** There are several options for reporting at the client admin level, and basic reporting offered to allow users to track their fundraiser's contributors.





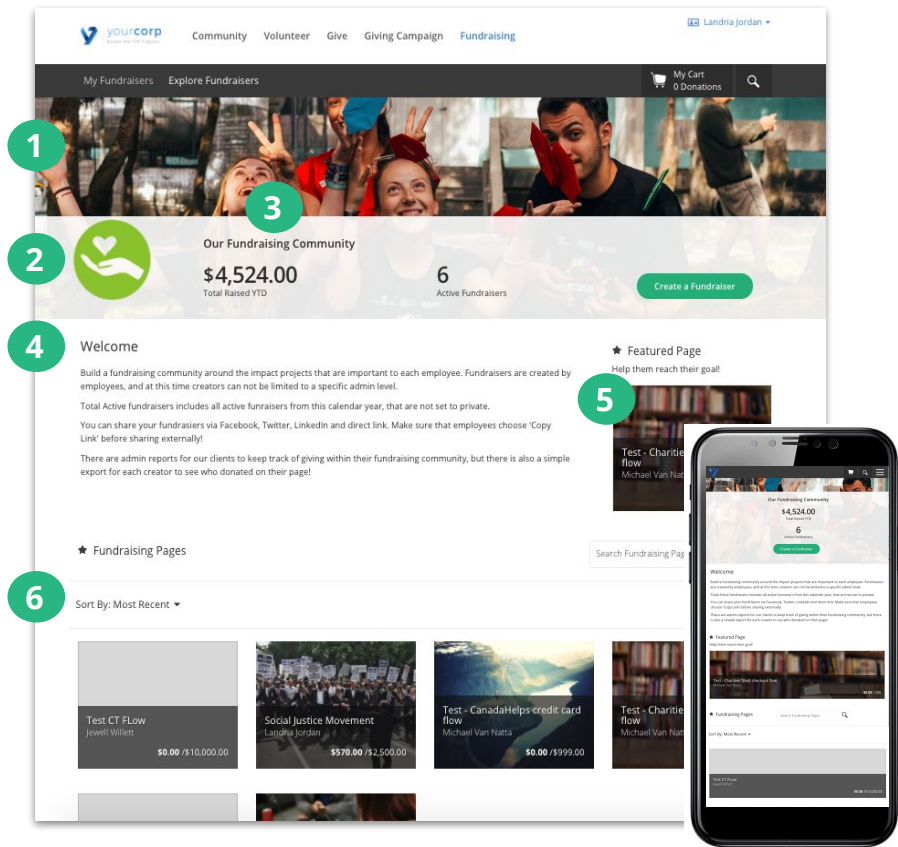
Fundraising Community

Information, Requirements, & Configuration Options

Setting Up Your P2P Community

Page Elements

1. Background Image
2. Fundraising Badge
3. Fundraising Community Name
4. Fundraising Community Description
5. Featured Fundraiser
6. Exploring Fundraisers



Setting Up Your P2P Community

1. **Background Image:** The background image sets the tone for your fundraising community. This image is covered by a slight gradient so it shouldn't be too detailed or focus on one subject. *Required.*
 - Minimum height: 700px, Maximum width: 1280px | JPG, PNG | GIF
2. **Fundraising Badge:** Make a custom icon to represent your fundraising community, or simply use an alternate version of your company logo. *Required.*
 - Minimum height: 130px, Maximum width: 130px | JPG, PNG | GIF
3. **Fundraising Community Name:** Give your community a custom name and make it stand out as a special program. *Required. 30 characters or less.*
4. **Fundraising Community Description:** Explain what fundraising means to your community. This will only be seen by internal users, and will not be read by anyone viewing a public version of a fundraiser. *Required. No Character Limit. Formatting options and hyperlinks available.*
5. **Featured Fundraiser:** The featured fundraiser can be changed as needed by request to your Account Manager. To change the featured fundraiser provide the fundraiser ID which is located at the end of the fundraiser's URL. While featuring a fundraiser is not required, if you don't set one it will cycle through the most recently created fundraisers.
6. **Exploring Fundraisers:** There are several ways to find a fundraiser:
 - Search by: Fundraiser Name or Fundraiser Creator Name (First Name, Last Name)
 - Sort by: Most Recent, Closest to Reaching Goal, Most Donations

Additional Details

Donation Types: P2P Fundraising supports One-time Payroll, Credit Card and Offline Donations.

Donation Types cannot be configured at this time.

- Internal Donors: based on community set up - One-time Payroll, Credit Card, and Offline
- External Donors: Credit Card only

Matching: P2P Fundraising syncs up with active matching programs. As match eligible users donate to a fundraiser for a match eligible charity they will be prompted to apply for a match. This match amount is included in the total raised, and seen in exports/reporting. Including matches this way prevents users from having to come back after the fact and request a match via offline.

- *NOTE: At this time, you cannot exclude matching opportunities.*

Segmentation: The P2P Fundraising tool cannot be segmented at this time.

Admin Approval & Permissions: At this time, P2P Fundraising is available for all users and does not offer any admin approval options. We encourage the use of the Creator Disclaimer, and if needed, a fundraiser can be deleted by YourCause at any time.

Cart-flow Custom Text: For internal donors, any custom text that has been added to the cart-flow will also appear during the donation check-out process for each unique donation type, cart confirmation, and donation complete page.

External Fundraising

Fundraising can be setup to allow external donors to participate.

Authentication: External donors enter a valid email address upon entry to the fundraiser. This email is stored in reporting. We do not store a name or any other information about the external donor.

Donations: External donors can only give via Credit Card. They do not have a donation history, and cannot access any other parts of the community. They will not receive a match prompt.

Emails: External donors will receive a credit card receipt to the email they entered at login.

Additional Settings:

Show Company Logo: As a client, you can elect to share your company logo on the external fundraising page.

Affiliate Email Recognition: If you want to avoid employees from signing in as an external donor, then activate this setting. *NOTE: If the email entered when visiting a public link is on the HR file the user is prompted to sign in through their authentication (SSO, etc.) and proceed as an employee.*

External Donor Disclaimer: Create a disclaimer that is displayed to users visiting the public link. *500 characters or less.*

External Fundraising

Welcome to the YourCause UAT Fundraising Community. This is where a client can leave information to the general public about their fundraising community. It should be under 500 characters.

☐ I have read, understand, and agree to YourCause Platform Privacy Policy and YourCause Platform Terms of Service

[View Page](#)

yourcorp
Social Justice Movement
Created by Landria Jordan
Raising for: RACE FORWARD

\$570.00 Raised of \$2,500.00 GOAL 22% FUNDED 83 Days 14 Hrs 16 Mins Remaining

ABOUT THIS FUNDRAISER

The movement for justice and reform for recurring acts of racial inequality has been a constant force in the framework of our political system, and many great fights have been won over time. However, in June 2020 in response to a series of tragic losses in our African-American communities. In response to these matters, we know that many of you are seeking to be connected with great organizations supporting the movement, as well as supporting the communities affected.

PHOTOS

Caroline Divan \$10.00 06/03/20

External Fundraising - Public Sign-In (with External Disclaimer)

yourcorp
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PHOTOS

SHARE THIS
Help Landria Jordan reach their goal!
[Share This Page](#)

RECENT DONATIONS

Brandon Chrome	\$100.00	06/08/20
Jewell June 8	\$45.00	06/08/20
Anonymous	\$10.00	06/08/20
Anonymous	\$10.00	06/08/20
Caroline Divan	\$10.00	06/03/20

External Fundraising - Fundraising Page

Social Sharing

The Social Share function must be active in order to create the public fundraiser experience, also known as 'External Fundraising.' Once active, users can share fundraisers in several ways:

Share this Page: By clicking 'Share this Page', the user can copy a public link for the fundraiser. This is the link that is required for external users to be able to give to the fundraiser

Social Media Platforms: Users can promote the public link via social media by clicking its icon. If the user is not logged in to the chosen platform they will be asked to login before sharing. Available platforms include:

- Twitter
- Facebook
- LinkedIn

NOTE: It is required to have at least one platform active to use the External Fundraising settings.

YourCause + blackbaud
Better Together.

Share This Page
https://yc.yourcauseuat.com/public#/fundraising/1405

Save our Playground
Created by Jewell Willett
Raising for Mohawk El

\$600.00 Raised of \$5,000.00 GOAL

ABOUT THIS FUNDRAISER
It's time to raise money for the kids at Mohawk Elementary School. The funds we raise will go to stocking teacher's classrooms, providing fun events for the kids, buying iPads, and supporting school maintenance.

SHARE THIS
Help Jewell Willett reach their goal!

Twitter Facebook LinkedIn Share This Page

Share a link with your followers
Check out this great fundraiser! https://yc.yourcauseuat.com/public#/fundraising/1405 #lovetogive
Tweet

RECENT DONATIONS
\$100.00
Ella Willett | 11/12/18



Fundraising User Experience

Features & Information

Creating a Fundraiser

Charity Selection: Search organizations available through your Give feature.

Fundraiser Name: This name will show in Explore Fundraisers, Admin Reporting, and NPO Donation Reports. *Required. 60 characters or less.*

Fundraiser Description: Tell people why you are fundraising for this charity. *Required. Unlimited characters, no formatting or HTML.*

Main Image: This image will show in the fundraiser's header and thumbnail. *Required.*

Maximum Size: 10MB. | Accepted Types: JPG, PNG, GIF. |
Recommended Dimension: 1280px x 700px

Video: Include a YouTube video on your fundraiser page. Using the top URL link, not the 'share link'. *Optional.*

Photo Gallery: Include up to 20 additional images to tell a story. *Optional.*

Maximum Size: 5MB. Accepted Types: JPG, PNG, GIF.

Fundraiser Setup:
Fill out the information below to get started

Ok, Jewell Willett

You are raising funds for: MARINE TOYS FOR TOTS FOUNDATION [Change](#)

Page Setup

Let's set up how your page is going to look.

Name Your Fundraiser *

This will show on thumbnails and at the top of your page.

About Your Fundraiser *

Tell your story. Why are you raising funds for this charity?

We are raising money and collecting toys for Toys for Tots in North Texas!

Main Image

This will be the background at the top of the page and appear on the preview shown on the community listing.
Maximum Size: 10MB. Accepted Types: JPG, PNG, GIF. Recommended Dimension: 1280 x 700

Drag & Drop File or [Upload File](#)

stevenlibralon-570406-unsplash.jpg

Remove

Add a Video

Have a video about your cause? You can add a YouTube link and feature the video on your page.

YouTube Link

Photo Gallery

You can upload up to 20 images that show your cause or feature your charity.
Maximum Size: 5MB. Accepted Types: JPG, PNG, GIF.

Drag & Drop File or [Upload File](#)

Continue

ALL INFORMATION CONSIDERED PRIVATE & CONFIDENTIAL | YOURCAUSE, LLC 6111 W. PLANO PARKWAY, SUITE 1000, PLANO, TEXAS 75093

Creating a Fundraiser

Fundraising Goal: How much do you want to raise? Amount Required. *Note: At this time fundraising is in USD only.*

- Set the goal as private and the amount will only show to the creator.

Date Range: Set the date for the fundraiser to end. The fundraiser will not be accessible after this date. *Required.*

Custom Designation: If a custom designation is created, it will be the default designation. *Optional. NOTE: If no designation is created, it will default to the Fundraiser Name.*

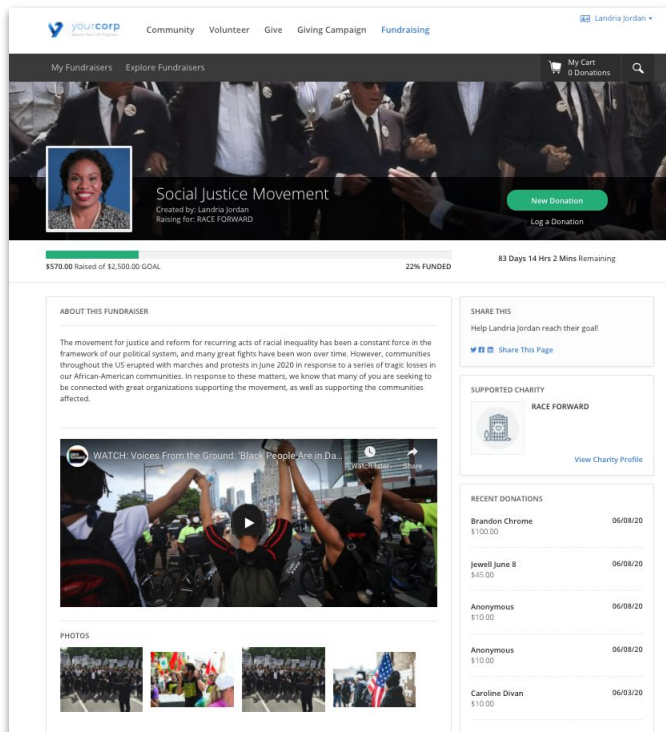
Privacy Setting: If a fundraiser is set to private, then it can only be shared by link. It will not appear in Explore Fundraisers. *Optional.*

Disclaimer: If active, creator's must agree to the disclaimer before launching their fundraiser.

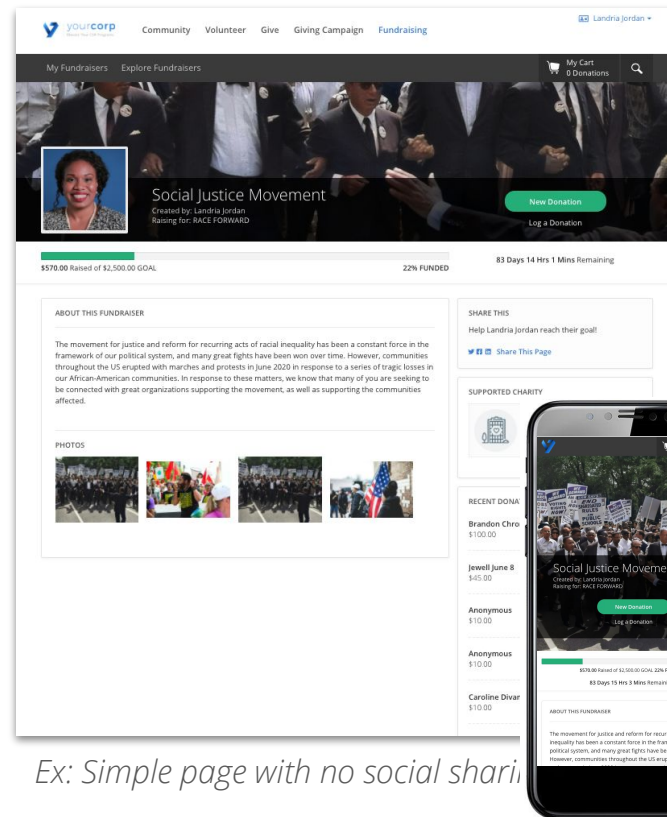
Launch Fundraiser: The Fundraiser is live and available once it's launched.

The image displays two overlapping screenshots of the 'Fundraiser Setup' interface. The top screenshot shows the 'Page Options' step, which includes sections for 'Setup a Goal' (with a text input for '5000.00' and a dropdown for 'USD'), 'How long will you be Fundraising?' (with a date picker set to '12/31/2018'), and 'Custom Designation' (with a text input for 'Toys for Tots Fundraiser'). The bottom screenshot shows the 'Review and Confirm' step, which displays a summary of the fundraiser: 'Fundraising for: MARINE TOYS FOR TOTS FOUNDATION', 'From: 11/07/2018 to 12/31/2018 (54 Days)', and 'Goal: \$5,000.00'. It also includes a 'Disclaimer' section with a checkbox for 'I have read and agree.' and a 'Launch Your Fundraiser' section with a 'Complete & Launch' button.

Creating a Fundraiser



Ex: Fully built including social sharing



Ex: Simple page with no social sharing

My Fundraisers

A fundraiser creator can keep track of their fundraisers by visiting Manage Fundraisers located under My Fundraisers.

Status

- **Inactive:** This is the status for a fundraiser that has expired. Unlike a fundraiser that is deleted, an inactive fundraiser can be edited and re-activated.

View: Quick link to the fundraising page.

Edit: Revisit the create flow and make edits as needed to the fundraiser settings.

- Every setting can be edited except the benefiting organization
- The creator must reconfirm agreement with disclaimers in place before launching the edits

Delete: If a fundraiser is deleted, it can no longer be accessed, but the creator can continue to pull the fundraisers Export.

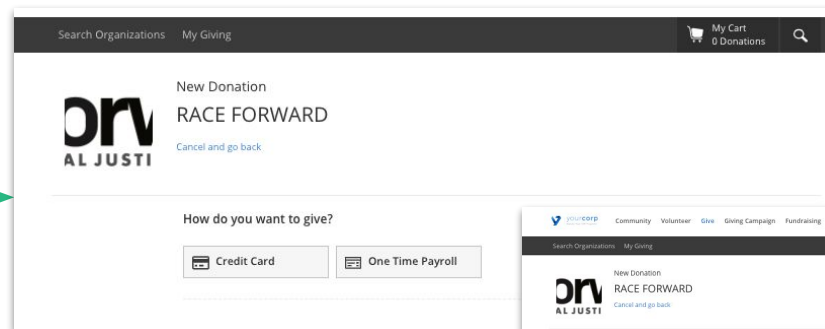
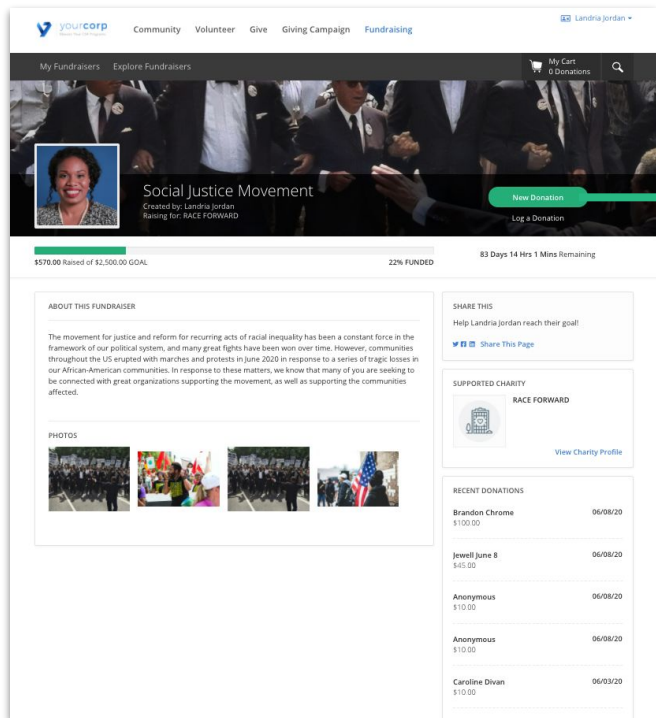
Export: Excel download including information about internal and external donors. Information includes: Basic Donor Information, Donation Information, and Match Information.

The screenshot shows the 'My Fundraisers' page in the YourCause interface. The top navigation bar includes links for Community, Volunteer, Give, Fundraising, and Groups. The 'My Fundraisers' link is highlighted with a green box. Below the navigation bar, the page title 'My Fundraisers' is displayed, followed by the subtitle 'You can view and edit your fundraisers here.' A table lists the fundraisers with columns for Created, Name, Status, Options, and Reports. The table contains 10 rows of fundraiser data.

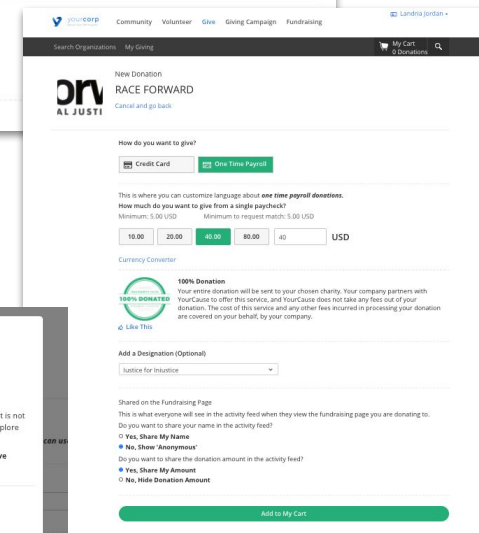
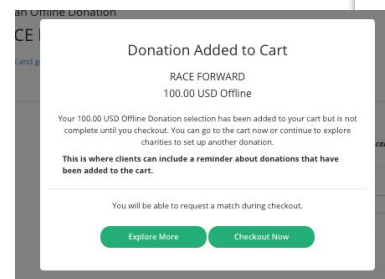
Created	Name	Status	Options	Reports
11/08/2018	Save our Playground	Active	View Edit Delete	Export
02/28/2018	Fund a Birth in Africa	Active	View Edit Delete	Export
09/06/2017	Hurricane Harvey Relief	Inactive	View Edit Delete	Export
08/07/2017	Coding Camp Fundraiser	Active	View Edit Delete	Export
08/07/2017	Farm Fresh Foods	Inactive	View Edit Delete	Export
08/07/2017	TGIF Free Food Friday	Active	View Edit Delete	Export
08/07/2017	Fund a Mom	Inactive	View Edit Delete	Export
08/26/2016	We're With You All The Way!	Inactive	View Edit Delete	Export
02/19/2016	Amanda's Bon Voyage	Inactive	View Edit Delete	Export
02/12/2016	Food 4 Kids	Inactive	View Edit Delete	Export

Internal Donation Flow

Internal donors (employees) click donate now and select a donation type from One-time Payroll, Offline Donations, or Credit Card (based on eligibility). They proceed through the donation flow, entering details for the specific donation type.



Highlights of the cart-flow experience.



Internal Donation Flow, cont'd.

If the fundraising donation is match eligible (amount, organization, etc.) the user will be prompted to apply before they confirm their donation. A confirmation email (and credit card receipt when applicable) will be sent after the donation is confirmed.

Match Eligibility & Questions
Before you can select Match Amounts, please complete the question(s) listed below on this page for each donation.

RACE FORWARD
Donation Amount 40.00 USD One Time Payroll

MATCH PROGRAM
Which Match Program would you like to use?
This match is eligible for multiple match programs. Choose one of the following.

- ☒ 2020 Payroll Match - 40.00 USD Available
- ☐ Do Not Match This Donation

MATCH QUESTIONS
Do you have any suggestions for the company regarding our match programs?

Thank you.

Cancel Next Step

Matching Prompt Page

Apply for Match
Great news. You can request a match for 1 of your donations.
For each donation, handle the steps below.

RACE FORWARD
Your Donation Value: 40.00 USD One Time Payroll

Match Program Info
This match does not require Admin Approval

Eligible Match Amount: 40.00 USD
The amount you apply for will be matched on or after 1/1/21

- ☒ Apply for 40.00 USD [Change Amount](#)
- ☐ Do Not Match This Donation

Match Cap
2020 Match Cap

Total Match Cap:	999,760.00 USD
Processed Match:	100.00 USD
Allocated/Pending:	140.00 USD

Total Match Requested: 40.00 USD

Back Next Step

Match Application Page

Internal Donation Flow, cont'd.

Donors will be

The screenshot shows the 'Privacy and Additional Information' step. At the top is a progress bar with four steps: 'Match Information' (active), 'Privacy & Payment Info', 'Confirm Your Pledges', and 'Complete'. Below the progress bar is the title 'Privacy and Additional Information' followed by a sub-header 'Privacy Information'. The main content area contains a dropdown menu labeled 'Name and Email' and a text input field labeled 'Enter Name (Optional)'. A 'Back' button is visible at the bottom right.

Charity Privacy Preferences & Recognition Name

The screenshot shows the 'Donations to Confirm' step. At the top is a progress bar with four steps: 'Match Information', 'Privacy & Payment Info' (active), 'Confirm Your Pledges', and 'Complete'. Below the progress bar is the title 'Donations to Confirm: 1' followed by a sub-header 'This is where custom text can live BEFORE confirming donations in checkout.' Below this is a table with five columns: 'Donation Type', 'Charity Name', 'Amount', 'Frequency', and 'Donation Total'. The table contains two rows: 'One Time Payroll' for 'RACE FORWARD' with an amount of '40.00 USD' and frequency of 'One Time', and a 'Match' row for 'RACE FORWARD' with an amount of '40.00 USD'. To the right of the table is a summary box showing 'TOTAL: 40.00 USD' and 'Match Requested: 40.00 USD' with a 'CONFIRM AND FINISH' button. A 'Go Back a Step' link is at the bottom right.

Donation Type	Charity Name	Amount	Frequency	Donation Total
One Time Payroll	RACE FORWARD	40.00 USD	One Time	40.00 USD
Match	RACE FORWARD	40.00 USD		

Donation review.

The screenshot shows the 'Complete!' step. At the top is a progress bar with four steps: 'Match Information', 'Privacy & Payment Info', 'Confirm Your Pledges' (active), and 'Complete'. Below the progress bar is the title 'Complete!' followed by 'Confirmed Donations: 1' and a sub-header 'This is where custom text can live AFTER confirming donations in checkout.' Below this is a section titled 'What would you like to do?' with two links: 'View My Giving History' and 'Go to Community Home'.

Success page.

External Donation Flow

External donors click 'Give Now' and enter their credit card information. They can choose their Privacy Preference for the charity, as well as their privacy information for the Fundraising Page before confirming their donation. The donor will receive an email receipt after a successful credit card donation is made.

yourcorp
Greater Good 501(c)(3) Program

Social Justice Movement
Created by: Landria Jordan
Raising for: RACE FORWARD

New Donation

\$570.00 Raised of \$2,500.00 GOAL 22% FUNDED 83 Days 14 Hrs 13 Mins Remaining

ABOUT THIS FUNDRAISER

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PHOTOS

SHARE THIS
Help Landria Jordan reach their goal!
[Share This Page](#)

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Jewell June 8	\$45.00	06/08/20
Anonymous	\$10.00	06/08/20
Anonymous	\$10.00	06/08/20
Caroline Divan	\$10.00	06/03/20

yourcorp
Greater Good 501(c)(3) Program

New Donation
RACE FORWARD
[Cancel and go back](#)

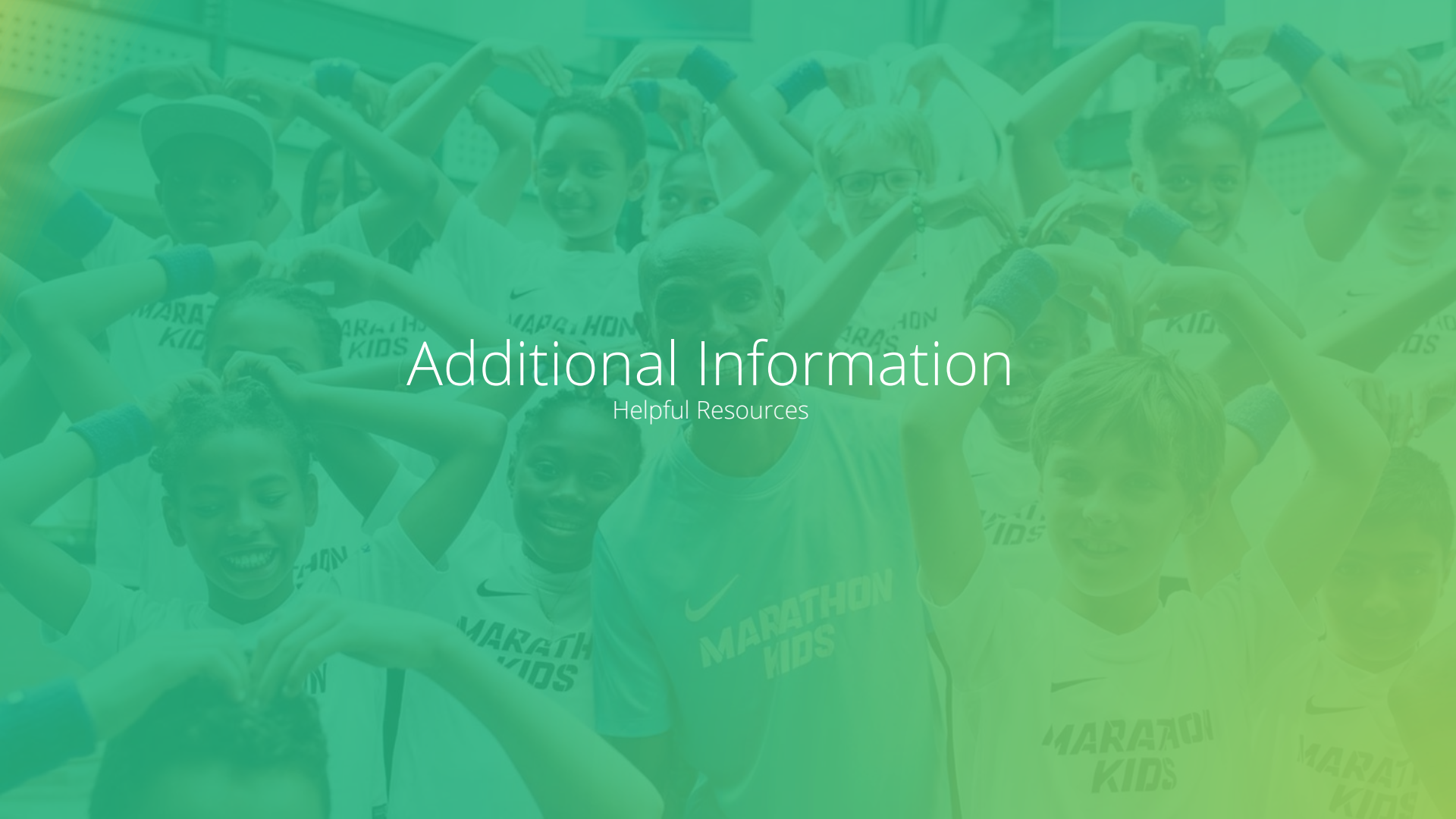
First Name Last Name

Amount USD Designation

What information do you want to share with the charities receiving your donation?

Shared on the Fundraising Page
This is what everyone will see in the activity feed when they view the fundraising page you are donating to.
Do you want to share your name in the activity feed?
☐ Yes, Share My Name
☒ No, Show 'Anonymous'
Do you want to share the donation amount in the activity feed?
☒ Yes, Share My Amount
☐ No, Hide Donation Amount

Enter Your Card Information
First Name
Last Name



Additional Information

Helpful Resources

Client Admin Reporting

STANDARD REPORTS

P2P Fundraising Reports are located in the Client Admin Panel > Reports > Give Reports > Pull a Report

Peer to Peer Summary Report

Featuring information about each Fundraiser including Creator Information, Donation Totals, Donor Counts, and Charity Information.

Peer to Peer Detail Report

Featuring transactional data about each fundraiser including Donor Information, Creator Information, Donation Totals, Donor Counts, and Charity Information.

All Giving Report:

P2P Fundraising is considered a Donation Type and internal donation are featured in additional Give reports like the All Giving Report. Transactions can be identified by Donation Type (Peer to Peer), Donation Location (Peer to Peer), and Donation Location Name (Fundraiser Page Name).

AD HOC REPORTING (Tableau)

Peer to Peer Fundraising Data Source available upon request to your Account Manager

Fundraising Checklist

Keep track of the decisions you are making for Peer to Peer Fundraising

Branding

- ☐ Background Image
- ☐ Fundraising Badge
- ☐ Fundraising Community Name
- ☐ Fundraising Home - Community Description

Disclaimers

- ☐ Custom Internal Disclaimer (for Fundraiser Creator)

Charity List

- ☐ Custom List for Eligible Charities

External Options

- ☐ Activate Social Share/Public Fundraisers
- ☐ Custom External Donor Disclaimer
- ☐ Activate Social Options:
 - ☐ Facebook
 - ☐ LinkedIn
 - ☐ Twitter
- ☐ Custom Social Post Message
- ☐ Custom Social Hashtag
- ☐ Activate Company Logo on the Public Fundraising Page
- ☐ Activate Prompt for Internal Donors to Login with their Affiliate Email

Reporting

- ☐ Activate Ad Hoc Data Source



Better Together.