COMMUNITY INVOLVEMENT TECHNOLOGY VENDORS 2020: AN OVERVIEW

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INTRODUCTION

Corporate giving and employee volunteering have become integral to businesses today. When managed strategically, these dimensions of community involvement can deliver significant value to both business and society. Technological tools have become increasingly essential to managing community involvement programs, from grant making to employee giving and volunteering. Since 2008, the Boston College Center for Corporate Citizenship has gathered information on technology options to support community involvement programs.

This report is for anyone selecting and managing technology solutions for employee giving, volunteering, and grant making programs. This report presents the self-reported survey responses of vendors. The Center purposely does not analyze survey responses. Therefore, the presented information reflects solely the claims of the responding vendors. The Boston College Center for Corporate Citizenship did not verify the validity of their responses and does not guarantee accuracy. Invitations to participate were sent to all vendors identified by staff and members of the Center for Corporate Citizenship.

This year's report provides information on 17 technology vendors that provide support to corporate citizenship programs.

Survey Respondents

America's Charities .... www.charities.org

Benevity .... www.benevity.com

Blackbaud + YourCause .... www.blackbaud.com

Bright Funds .... www.brightfunds.org

Catchafire .... www.catchafire.org

CyberGrants .... www.cybergrants.com

FLUXX .... www.fluxx.io

GivingTrax .... www.givingtrax.com

GlobalGiving .... www.globalgiving.org

Golden .... www.goldenvolunteer.com

InvolveSoft .... www.involvesoft.com

SmartSimple Software .... www.smartsimple.com

Sponsorium .... www.sponsor.com

StratusLIVE .... www.stratuslive.com

True Impact .... www.trueimpact.com

VolunteerMatch .... www.volunteermatch.org

WeSpire .... www.wespire.com

Throughout the report, boxes that are shaded gray in the tables are not applicable for that particular vendor.

Programs Offered

	America's Charities	Benevity	Blackbaud + YourCause	Bright Funds	Catchafire	CyberGrants	FLUXX	GivingTrax	GlobalGiving	Golden	InvolveSoft	SmartSimple Software	Sponsorium	StratusLIVE	True Impact	VolunteerMatch	WeSpire
Approximate number of clients	50+	610		65	4	450	250	250-500	80	2000	41	118	300	1000+	50	150	35
Company founded	1980	2008	1981	2012	2010	1999	2011	2012	2002	2015	2016	2002	1987	2008	2005	1998	2010
Approximate number of employees	40	600	3300+	15	54	200+	80	21-50	67	50	50	90	35	30	10	30	25
Organization type																	
• Traditional corporation			X	X		X		X		X	X	X	X	X			X
• B-Corp (benefit corporation)		X			X										X		
• Nonprofit	X								X							X	
• C-Corporation							X										
• Services available outside the United States	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Languages other than English																	
• Software platform	X	X	X			X	X	X		X	X	X	X		X		X
• Online support	X	X	X			X			X		X	X	X				
• Phone support	X	X	X			X							X	X			
Employee giving programs supported																	
• Giving campaign	X	X	X	X		X		X	X	X	X	X	X	X	X		X
• Disaster response	X	X	X	X		X		X	X	X	X	X	X	X	X		X
• Political action committee	X	X	X	X		X					X		X	X	X		X
• Matching gift	X	X	X	X		X		X	X	X			X	X	X		X
• Fundraising/crowd-funding	X	X	X	X				X	X	X			X	X	X		X
• Other (see below)	X			X										X			
Volunteer programs supported																	
• Dollars for doers	X	X	X	X		X		X	X	X			X		X	X	X
• Volunteer management	X	X	X	X	X	X		X	X	X	X	X	X	X		X	X
Grant programs supported																	
• Grant management	X	X	X	X		X	X	X				X	X		X		X

Additional Information: Programs Offered

Employee giving programs: Other	
America's Charities	Employee Giving, Corporate Giving, Volunteer Grants, Board Service Giving, Team-based giving, Political Action Committees - America's Charities technology solutions are capable of listing PACs for managing employee contributions and corporate matching gifts to nonprofits based on PAC donations. However, as a nonprofit, America's Charities does not distribute funds to PACs or other organizations for political purposes.
Bright Funds	GoFundMe campaigns, virtual gift cards, and automated employee milestone awards, high-impact cause-based giving, company-aligned flagship funds
GlobalGiving	Gift cards
Golden	In-kind donations
StratusLIVE	Clients can use our system for specialized fundraising campaigns, with or without a not-for-profit as the recipient of the funds raised.

International capacity and languages supported	
America's Charities	Our platform offers native multi-language, multi-currency, and multi-time zone features, including dynamic translations for more than 20 languages. Platform supports both entire system and configuration translation. Currently, the entire system is based in English, French, Spanish and Danish. However, data entered into text fields can be translated into multiple languages using Google Translate. As such, content of a field (such as an event summary) could be auto translated into any supported language by enabling the field translation feature. Phone support is in English and Spanish.
Benevity	Our software is available in 20 languages: English (US, UK and Canada), French (Canada and France), Spanish (Latin America and Spain), Dutch, Portuguese (Brazil), German, Japanese, Chinese (Simplified, Traditional, and Taiwanese), Italian, Polish, Swedish, Turkish Thai, and Korean. The Benevity Causes Portal, our dedicated site for charities and nonprofits around the world, is available in 12 languages to better support the global charities your team gives to. These include English, French (Canadian), Spanish (Spain), Portuguese (Brazilian), German, Italian, Japanese, Polish, Russian, Swedish, and Chinese (Simplified and Traditional).
Blackbaud + YourCause	The client advocacy desk provides English and Spanish support for all support methods (phone, email, live chat) and is able to provide email and live chat support in over 50 languages.
CyberGrants	Dutch, English (US), French (Canada), French (France), German, Italian, Japanese Korean, Portuguese (Brazil), Russian, Spanish (Latin)
GlobalGiving	Spanish, French, Portuguese, Mandarin, Hindi
Golden	Spanish, Japanese, Thai, Hindi, several other languages in 2020
InvolveSoft	French Canadian, Spanish
SmartSimple Software	The SmartSimple platform comes with the flexibility to support and language. Phone & online support is provided in English, French, Spanish (Latin America and Spain), Arabic, Chinese (Mandarin and Cantonese), and Hindi.
Sponsorium	Sponsorium's tool works in 25+ languages, including Chinese and Arabic, and they have local support staff to help clients in their native language.
True Impact	Customizable (Volunteerism ROI Tracker Surveys)
WeSpire	The solution is currently available in English (US and UK) and Spanish and user can add content in any language they wish. WeSpire is in use in 146 countries around the world. The largest user base is English-US, followed by English-United Kingdom, Chinese-Mainland China, and Spanish-North America. The WeSpire platform can detect the language of a user's web browser or mobile device. The default language for the User Interface is English-US, which will be displayed if the detected language is not available.

Employee Giving

	America's Charities	Benevity	BlackBaud + YourCause	Bright Funds	Catchafire	CyberGrants	FLUXX	GivingTrax	GlobalGiving	Golden	InvolveSoft	SmartSimple Software	Sponsorium	StratusLIVE	True Impact	VolunteerMatch	WeSpire
Vendor can distribute funds to nonprofits	X	X	X	X		X		X	X	X		X		X			X
Employees can make donations via																	
• Credit cards	X	X	X	X		X		X	X	X	X	X		X			X
• Checks	X		X					X	X			X		X			X
• One-time payroll deduction	X	X	X	X		X		X		X	X	X		X			X
• Recurring payroll deduction	X	X	X	X		X		X		X		X		X			X
• Stocks	X	X	X						X			X					
Employees can make donations																	
• Online	X	X	X	X		X		X	X	X	X	X		X			X
• By paper form	X		X			X		X	X	X							X
• By phone			X			X		X	X			X					X
• On a mobile device	X	X	X	X		X		X	X	X		X		X			X
Employees can request match																	
• Online	X	X	X	X		X		X	X	X	X	X		X			X
• By paper form	X	X	X			X											X
• On a mobile device	X	X	X	X		X		X		X		X		X			X
• By phone			X			X			X			X					X
Employees can receive confirmation of their donation																	
• Online	X	X	X	X		X		X	X	X	X	X		X			X
• Via email	X	X	X	X		X		X	X	X	X	X		X			X
• Via hard copy			X			X				X		X					X
• On a mobile device	X	X	X	X		X		X	X	X	X	X		X			X

Employee Giving (continued)

	America's Charities	Benevity	BlackBaud + YourCause	Bright Funds	Catchafire	CyberGrants	FLUXX	GivingTrax	GlobalGiving	Golden	InvolveSoft	SmartSimple Software	Sponsorium	StratusLIVE	True Impact	VolunteerMatch	WeSpire
Employees can view their giving history																	
• Online	X	X	X	X		X		X	X	X	X	X		X			X
• On a mobile device	X	X	X	X		X		X	X	X	X	X		X			X
• By email request	X		X	X		X		X	X	X		X		X			X
• By phone request (receive email or hard copy)	X					X			X	X		X					X
Nonprofits receive confirmation of employee donations via																	
• Email	X	X	X	X		X		X	X	X	X	X		X			X
• Paper based	X		X	X						X		X		X			

Additional Information: Employee Giving

America's Charities	America's Charities distributes funds to 501(c)(3) tax-exempt charitable organizations, schools, and universities. Monthly credit card and Paid Time Off donations are also supported By phone as in through platform on a mobile phone or app. Donations by phone call are not accepted. Phone calls may be made to America's Charities Customer Support for assistance during business hours. Offline and paper pledges can be processed if client requests, however additional fees may apply depending upon volume of data entry and offline processing. Users can view personal giving history at will — hard copies/emails may be printed from the platform or requested if needed. Nonprofits receive reports through online secure file transfers (SFTP) and by paper reports emailed or mailed with contributions.
Benevity	Confirmation of the donation and match is done in-tool and in real time so employees know exactly what was matched (non-profits do not have to confirm the donation to get the match). Non-profits can also access detailed donation reports (subject to user's privacy settings) through our Benevity Causes Portal.
Blackbaud + YourCause	Blackbaud + YourCause's pricing structure is focused on maximizing generosity and impact and deploys a Transparent Giving model to do so. YourCause does not take a percentage of employee or corporate dollars. Overall, YourCause's pricing structure is divided into three different buckets - subscription fees, payment distribution fees, and additional options.
Bright Funds	We support various employee giving programs, including (but not limited to) matching gifts, employee assistance, tuition reimbursement, wellness programs, board service, ERGs, charitable spending acountss, and product./in kind giving
CyberGrants	CyberGrants provides a single employee engagement site on which employees can perform all of their social impact activities. CyberGrants also supports multicurrency programs outside of the United States, including integrations with 3rd party vetting and distributions partners such as CAFA, NGO Source, etc.
Golden	Golden supports employee giving through a variety of partners, such as Community Health Charities, United Way, Charity Navigator, ADP, America's Charities, and StratusLIVE
StratusLIVE	Our system can also take donations of PTO for conversion to donations OR donate PTO to employees in need of additional time off due to illness and or other qualifying factors.
True Impact	True Impact is an enhanced measurement and reporting platform that integrates with existing employee giving management systems. It enables companies to translate their donations into social outcomes and benchmark thei performance. Results can be rolled up to calculate the company's aggregate social impact worldwide, and reported in terms of the SDGs.
WeSpire	Through our close partnership with Givinga, a philanthropy-as-a-service firm, WeSpire delivers custom corporate philanthropy capabilities. Behind the scenes, Givinga will power the financial aspects of the Giving and Grants Management while WeSpire provides the Volunteering capabilities. Through our partnership with Givinga, WeSpire will enable organizations to make grants from the Foundation to the Givinga Donor Advised Fund, which will then immediately disburse the monies to the desired charity. The organization is making gifts to the Givinga Donor Advised Fund, a registered, insured, tax-advantaged and fully compliant charitable organization. So, the organization's liability for vetting and approving charities is eliminated. That responsibility lies with the Givinga Donor Advised Fund, who performs this function at scale across all their customers and so they can provide vast economies that are passed along to the organization.

Volunteer Management

	America's Charities	Benevity	BlackBaud + YourCause	Bright Funds	Catchafire	CyberGrants	FLUXX	GivingTrax	GlobalGiving	Golden	InvolveSoft	SmartSimple Software	Sponsorium	StratusLIVE	True Impact	VolunteerMatch	WeSpire
Employee event organizers have the ability to post volunteer opportunities online	X	X	X	X		X		X		X	X	X	X	X		X	X
Nonprofits have the ability to post volunteer opportunities online	X	X	X	X	X	X		X	X	X	X	X				X	X
The volunteer management system automatically interfaces with the vendor's Dollars for Doers program	X	X	X	X		X		X		X	X	X				X	X
Database of available volunteer opportunities maintained and ready for use upon implementation	X	X	X	X	X			X	X	X	X					X	X
Volunteer opportunity recommendations provided to users based on skills, interests, or other preferences designated in their profile	X	X	X	X	X	X		X	X	X	X	X				X	X
Employees can do the following online																	
• Sign up for a company-sponsored volunteer opportunity	X	X	X	X	X	X		X	X	X	X	X	X	X		X	X
• Sign up for volunteer opportunities in the community (not linked to company)	X	X	X	X	X	X		X		X	X	X		X		X	X
• Sign up for a specific time slot at a volunteer opportunity	X	X	X	X	X	X				X	X	X	X	X		X	X
• Sign up for a specific role at a volunteer opportunity	X	X	X	X	X	X			X	X	X	X	X	X		X	X
• Log hours after a volunteer activity	X	X	X	X	X	X		X	X	X	X	X	X	X		X	X
• See a history of their volunteering	X	X	X	X	X	X		X	X	X	X	X	X	X		X	X

Volunteer Management (continued)

Vendor volunteer management program offers																
• Automated recognition management (e.g. automatic notification when employees reach eligibility for an award, grant, or other recognition)	X	X	X	X		X				X		X				X	X
• Customized online employee evaluations	X	X	X	X	X	X		X		X		X	X		X		X
• Customized online employee surveys to review specific events	X	X	X	X		X		X	X	X		X	X				X
• Customized online employee surveys not related to specific events	X	X	X	X	X	X		X		X		X	X	X			X
Employees can search for volunteer opportunities																	
• By location	X	X	X	X	X	X		X		X		X	X	X		X	X
• By skills needed	X	X	X	X	X	X		X	X	X	X	X	X			X	X
• By topic/interest	X	X	X	X	X	X		X	X	X	X	X	X			X	X
• By other (see next page)	X	X	X	X	X	X				X		X				X	X

Additional Information: Volunteer Management

Volunteer search options: Other	
America's Charities	Date, time, organization, cause area
Benevity	Advanced search tools are available to help the user find and filter available opportunities. This includes the option to search by keyword and filter the results by location, radius, date, cause, opportunity type, skills, interests and other characteristics such as "good for kids".
Bright Funds	Company-sponsored, eligible for matching, remote opportunities, campaign collections, peer recommendations, date
Catchafire	Length of project and nonprofit organization
CyberGrants	Date and time, remaining availability
Golden	Artificial intelligence powered content recommendation engine, additionally there are search filters for: Schedule, Indoor/Outdoor, Active/Mellow, Social/Independent, Mind/Body, Physical/Virtual
InvolveSoft	Employee groups
SmartSimple Software	SmartSimple can tailor search criteria to any data point related to the volunteer event.
VolunteerMatch	Good for groups, kids, and teams (for families)
WeSpire	Employees can search by team, tenure, job function, and other categories that companies may choose to designate.
Additional comments	
America's Charities	Pre-populated volunteer opportunites are available through VolunteerMatch or other volunteer service listing the client would like to include. Administrative and Community Leader roles may be assigned across markets to create and manage volunteer activities based on locations. Employees may also post volunteer events if permissible by client. Event information fields may be defined by clients. Reports are customizable, dependent upon client need, and can be set-up and auto-generated through the platform.
Benevity	All team-based giving and volunteering activity can be presented on a leaderboard to give recognition to the clients' top volunteers, fundraisers, and donors. This functionality also promotes a little friendly competition, and team members can communicate via chat and email directly from the team page, where an employee's prosocial behavior can be highlighted and shared.
Blackbaud + YourCause	Our volunteer manager allows for client-by-client or event-by-event configuration. This provides corporations with an intuitive and simple experience in managing events of all shapes and sizes. This flexibility and user-friendly functionality of the platform allow both one-off hyperlocal events, as well as large, global volunteer campaigns to be managed with the same level of ease and efficiency.
Bright Funds	Employees have multiple ways to discover and sign up for volunteering opportunities, including activities within the company, activities posted by nonprofits in the community, and company-recommended opportunities for organizing events. Any employee may create and manage a volunteer event to share within the company. Employees who sign up for volunteering events automatically receive credit for their hours, eliminating the need to log back into the platform after the project to record their hours. Employees can also share photos and comments with fellow attendees directly in the platform. For recognizing employees, Bright funds can award virtual badges for different levels of volunteerism and add those badges on to employee email signature.

Additional Information: Volunteer Management

Catchafire	Catchafire designs customized and scalable skills-based volunteer programs for leading companies. Our state of the art technology empowers employees with choice so that they can discover meaningful projects tailored to their skill sets and aligned to the causes they care most about. The flexiblity of virtual skills based volunteering provides a truly inclusive experience that enables employees to customize how they incorporate volunteering into their work and life. The pre-scoped nature of the projects and the guided experience on the platform ensure that value is derived for the nonprofit and volnteer and these outcomes are tracked in real time and easily accessbile to companies.
CyberGrants	We offer gamification and viral competition features to organically drive participation and engagement. Track participation by teams or individuals, and easily encourage people through the platform to bring friends and colleagues along to help the cause.
GlobalGiving	Our volunteer opportunities are all online opportunities hosted through our product, GlobalGiving Time.
Golden	The infrastructure supports direct and indirect organizing, such as program aggregation of partner organizers - a program management requirement of many foundations, governments, and United Ways. All opportunities on Golden, whether public or private,are live inventory with intelligent management of volunteer eligibility, time slot capacity, cancellations and completions. Signups are live registrations, and can handle live background checking, waiver processing, emergency contact capture, and parental consent. The products are native mobile applications and responsive web applications that support any internet connected device without an implementation process. International localization, custom system integrations via SDK and APIs, data migration, and program management road maps can be deployed on the client's schedule.
SmartSimple Software	SmartSimple's volunteer management capabilities can also be used to track, manage and report on pro bono services. SmartSimple offers optional integration with the VolunteerMatch Network for companies looking to source turnkey, vetted volunteer opportunities.
Sponsorium	Sponsorium provides the unique ability to link all volunteer activities with grant/donation management activities (if necessary), so individuals or teams of users can truly and fully collaborate
StratusLIVE	Our system enables you to log hours to "personal volunteering events" as well as "corporate events" in order to be counted towards overall volunteer hours.
True Impact	True Impact is an enhanced measurement and reporting platform that integrates with existing volunteer management systems. It enables companies to translate their volunteer activities (including traditional, skills-based, pro bono, ICV, and board service) into social outcomes and bench mark their performance. Results can be rolled up to calculate the company's aggregate social impact worldwide, and reported in terms of SDG's.

Dollars for Doers

	America's Charities	Benevity	Blackbaud + YourCause	Bright Funds	Catchafire	CyberGrants	FLUXX	GivingTrax	GlobalGiving	Golden	InvolveSoft	SmartSimple Software	Sponsorium	StratusLIVE	True Impact	VolunteerMatch	WeSpire
Vendor can distribute funds to nonprofits	X	X	X	X		X			X	X		X					X
Employees are notified by the system if eligible for Dollars for Doers grant	X	X	X	X		X			X	X		X				X	X
Employees can track progress of hours volunteered toward grant	X	X	X	X		X				X		X				X	X
Employees can request grants																	
• Online	X	X	X	X		X						X				X	X
• By paper form	X		X			X											X
• By phone			X			X						X					X
• On a mobile device	X	X	X	X		X						X					X
Employees can receive confirmation of their donation																	
• Online	X	X	X	X		X			X	X		X				X	X
• Via email	X	X	X			X			X	X		X					X
• Via hard copy	X		X			X				X		X					X
• On a mobile device	X	X	X	X		X			X	X		X					X
Nonprofits can receive confirmation of donations																	
• Via email	X	X	X	X		X			X	X		X				X	X
• Paper based	X		X	X						X		X					

Additional Information: Dollars for Doers

Additional comments	
America's Charities	Offline and paper forms may be supported at client's request. Additional fees may apply based on volume for data entry and processing. Hard copy donation confirmations may be printed from the platform or mobile device. Automated emails may be generated from the platform also. Hard confirmations may also be mailed to those without online access by client request. Additional fees may apply for printing and postage depending upon volume.
Benevity	Nonprofits registered in the Benevity Causes Portal have access to reports that provide donation information categorized by company and donor/employee (subject to the user's privacy settings). In addition to Dollars for Doers and volunteering grants, users can earn badges for tracked hours, Benevity can enable gamification using Teams and Leaderboards functionality, and administrators can use News Items to share stories and impact.
Blackbaud + YourCause	YourCause offers flexible ways for clients to incentivize employees via automated Dollars for Doers programs. Dollars for Doers rewards can go to the organization where the employee volunteered, or clients can choose to allow employees to direct these funds to another eligible organization of their choosing. Clients can also manually distribute incentives to employees for a variety of use cases (Ex: new hire incentive, employee recognition, competitions).
Bright Funds	Bright Funds provides several robust configuration options for Dollars for Doers programs. Configurations include a direct dollar amount awarded per volunteer hour recorded, a credit grant awarded per volunteer hour recorded, or an annual volunteer hour goal which triggers eligibility for a grant. Customized applications can prompt employees who reach their annual goal to reflect on what they've learned through the experience and program administrators review this feedback to trigger the grants.
CyberGrants	CyberGrants programs allow employees to record hours throughout the course of the year and receive a notification once they become eligible for a dollars for doers grant based on highly configurable program rules. Alternatively, CyberGrants can also offer programs that require only a single page form for entering of hours and application for a grant.
GlobalGiving	Volunteer hours are not tracked/hosted on GlobalGiving's platform.
Golden	Golden integrates with a variety of third party partners to administer dollars for doers programs. All Golden data is fully automated, meaning the hours are counted in real time, without requiring manual human data entry into a form or spreadsheet. Additionally, Golden supports manual submissions for capturing activities beyond the Golden ecosystem.
True Impact	True Impact is an enhanced measurement and reporting platform that integrates with existing management systems for Dollars for Doers programs. It enables companies to translate these contributions into social outcomes and benchmark their performance. Results can be rolled up to calculate the company's aggregate social impact worldwide, and reported in terms of SDG's.
VolunteerMatch	Our dollars for doers solution interacts with both the employee history and the nonprofit contact to verify and validate this gift of time, but we do not directly disburse the gifts to the nonprofit or the employee.
WeSpire	The platform provides a fully customizable "dollars for doers" program. Each company can specify eligibility criteria according to their unique business rules. Companies can adjust business rules for matching as required. We provide real time reporting access to track matching activity and provide restricted admin acess to company rule set up and editing. Business rules can be applied and approved automatically or via a manual admin approval process.

Grant Management

	America's Charities	Benevity	Blackbaud + YourCause	Bright Funds	Catchafire	CyberGrants	FLUXX	GivingTrax	GlobalGiving	Golden	InvolveSoft	SmartSimple Software	Sponsorium	StratusLIVE	True Impact	VolunteerMatch	WeSpire
Vendor can process grants to international organizations (see limitations below)	X	X	X	X		X	X	X	X			X	X		X		X
Vendor's grant management software supports																	
• Online applications	X	X	X	X		X	X	X	X			X	X				X
• Independent client uploads	X	X	X	X		X	X		X			X	X				X
• Eligibility quizzes	X	X	X	X		X	X	X				X					X
• Applicants checking the status of their request online	X	X	X	X		X	X	X	X			X	X				X
• Reviewers seeing and rating applications online	X	X	X	X		X	X	X	X			X	X				X
• Multiple levels of grant review	X	X	X	X		X	X	X	X			X	X				X
• Tracking sponsorships	X	X	X			X	X	X	X			X	X				X
• Tracking product donations	X	X	X	X		X	X	X	X			X	X				X
• Linking payment to requirements	X	X	X	X		X	X	X	X			X					
• Other (see below)						X	X	X	X								
Vendor's program communicates with grantees via																	
• Physical letters	X	X				X	X						X				
• Email	X	X	X	X		X	X	X	X			X	X				X
• Website outreach	X		X	X		X	X					X	X				
• Social media	X		X	X		X						X					
• Other (see next page)	X						X	X				X					X

Additional Information: Grant Management

Grant management software: Other	
CyberGrants	We support multi-currency and multi-language programs.
FLUXX	FLUXX Grantmaker has all the features to manage the full lifecycle of a grant, from application intake to payment and impact tracking. It provides functionalities to facilitate application review process and interactions with grantees, manage and allocate budget, automatically create grant related documents, store and manage detailed constituent information, perform due diligence and more.
GivingTrax	Support of multi-year grants and flexible configuration options are standard
GlobalGiving	We also manage grantee reports.
SmartSimple Software	SmartSimple features configurable portals for all stakeholders including grants managers, program officers, reviewers, board members, finance managers, applicants, and grantees. They also offer configurable workflows that empower organizations with process automation; Robust pre-screening including tax authority, OFAC, program eligibility and integration with GuideStar; Scored review forms with weighted averages and multi-stage review processes, Conflict of Interest declaration; Creation of all grant related documentation from templates, including meeting dockets and optional e-signature for all documents; Automated creation of all post award activities including, payment schedules, PRI repayment schedules, reports, and outcomes; Automated alerts and reminders for all processes and forms and a complete audit trail including field value changes.
Once a grant is approved, how do you track payments, grantee reports and payment requirements?	
America's Charities	Payment tracking, grantee reports and payment requirements are configured in the platform based on client requirements. Our Universal Tracking Application (UTA) enables the tracking and management of any process. Multiple UTAs can be actively linked, so data is shared across the platform. Automate your organization's workflows with our Workflow Automation process, modifying and branching as needed. Based on client needs, grants payment tracking may include but is not limited workflows configured to chart grant review, approval to payment requests, built-in reports are used to request grant payments and coordinate with Accounting/Finance Depts, grant payments may be sent from client to America's Charities via electronic funds transfer for distribution to grantees, or clients may elect to pay grantees directly, payment confirmation reports are uploaded into the platform from America's Charities for online access, and charities receiving grants may also post confirmation of receipt to platform.
Benevity	All activity related to the grant request is tracked within the request itself and can be reviewed at any point. An audit log maintains a record of all actions and changes, including a user name and time stamp.
Bright Funds	After a grant has been approved, grantors can track payments through Bright Funds system. The client can see whether it is scheduled or paid, what the payment type is, what budget the payment should draw from, what the payment ID is, and any additional notes. Impact reports are automated through the Bright Funds system. When a grantor creates a grant program on Bright Funds, they have the ability to create impact reports for those approved nonprofits. A grantor can automate this so that impact report requests are automatically sent to the nonprofit at the appropriate cadence (6-month and 1-year, etc.).
CyberGrants	Impact reports track grantee progress and impact. Our disbursements solution tracks payments and history and can process via ACH or ETF payments. If our DAF solution is not an option, we can set up a for-benefit-of account dedicated to a client's donations, and issue disbursements via ACH or printed checks that carry branded identity while we handle the administration. Or payments need to be handled in-house, we can furnish reports to a client

Additional Information: Grant Management

FLUXX	Payments and post award requirements such as reports are automatically set up and tracked once a grant is approved. FLUXX Grantmaker makes it easy to communicate with grantees about payments and report dates, deadlines, and requirements via automated email alerts, letters, and/or notifications. Contingency requirements for payments can be defined and tracked. The system can be set up to automatically move payments to be scheduled when the contingency is met and approved.
GlobalGiving	GlobalGiving offers a wide range of grantmaking services from conducting rigorous due diligence reviews of organizations and moderating grant proposals to disbursing funds and facilitating reporting from grantees to ensure your funds have been spent appropriately and monitored for impact. GlobalGiving also provides its corporate partners with program expertise on international grantmaking, leveraging its extensive experience and knowledge of the complex international compliance landscape. Payments and reporting is all tracked on our GlobalGiving grants manager tool.
SmartSimple Software	Generally, once a grant has been awarded the payment schedule is automatically generated. Each record is set to a "pending" status. A grant is associated with any number of pre-grant award and post-grant award activities, such as milestones, site visits, reports, reviews, approvals, and payments. Business rules define the schedule and milestones required, and these activities are automatically created. The payment may be encumbered and controlled by the grantee's report back. Once the report is recieved and approved the payment status would change to "scheduled" status. These records are exported to the accounting system for actual payment. The update payment record is generally sent back to the system and updates the payment records with the actual payment date, check, or transfer number.
Sponsorium	Grantors are able to report continuously on their projects and grantees are able to submit in progress reports for impact analysis.
WeSpire	This is customized for each group. Groups can handle payments on their own. In this case it is simply self reporting. The other options is we handle payments. In this case once the grant is approved, we take funds the company provides us and send it to the organization based on the organization's selected payment preference (mailed check or cash). We track the sending of the payment and the cashing of the payment by the organization. Grantee and payment requirements are also customizable by organization.
Program communication channels: Other	
America's Charities	Communications are configured based on client needs and may include but are not limited to -- Automated communications sent through the platform inform applicants whether they meet the eligibility requirements or not; Grantees may receive notifications of additional information required, status of grant review, and grant approvals through the platform; Communicate performance indicators and outcomes reports through the platform.
FLUXX	Applicants and grantees also have access to a secured portal that enables them to interact directly with the giving organization's team and access/provide key information and documentation.
GivingTrax	Grantee dashboard
SmartSimple Software	Through the Grantee/Applicant portal
WeSpire	Online portal where grantees can see status of application and communicate with reviewers.
International limitations	
Bright Funds	Grants to non-US charities must meet equivalency determination or requirements set forth by Bright Funds partner companies, if different.
CyberGrants	CyberGrants integrates with third parties who distribute funds outside the United States.
WeSpire	Companies need to specify desired geographies and organizations.

Additional Information: Grant Management

Additional comments	
Benevity	The grants application process leverages the Benevity Causes Portal (a separate website where charities and NPOs can register and provide relevant profile information that can be pulled into the application and grant review process). With their profile easily available to Benevity's entire client base, charities, and NPOs eliminate redundant tasks such as maintaining multiple portals for each potential company. Registration in the portal also helps charities recieve their disbursement more efficiently (this year, 88% of our disbursements were electronic!).
Bright Funds	Bright Funds offers a company grant tool to facilitate grants to nonprofits. The company may set up multiple grant programs and customize each grant program according to the specific requirements, including a budget, eligibility quiz, application, due date, tiered review process, impact reporting, and payment schedule. Bright Funds' approach to grants management focuses on the user experience - both for the nonprofit applicants and company grant administrators.
CyberGrants	CyberGrants platform offers full support for every type of giving. Additionally, it is completely agile so the client can add or evolve programming to maximize impact.
FLUXX	Fluxx Grantmaker simplifies operations with an end-to-end grants management platform that serves as a digital hub for grants staff and grantees to interact from application to outcome. Grantmaker makes submission processes transparent, roles and tasks clear, data easily accessible and grant impact immediately visible.
GlobalGiving	GlobalGiving offers custom corporate branding, corporate communications, and due diligence questions. GlobalGiving has disbursed donations to more than 170 countries and processed grants in most of these.
SmartSimple Software	There is never a requirement for customization by developers or programmers, as the implementation process does not require coding. There is no installed software or desktop requirements. SmartSimple is entirely cloud-based and securely hosted in global data centers. The key elements of the system are web based where all functionality is delivered through any supported browser on any computer or mobile device. All access to the system is controlled by the user's role. This approach provides an appropriate interface for each stakeholder group, such as applicants and reviewers. As business requirements evolve, the client can modify the system to meet new requirements. No additional licensing is required to use the reporting system. Reports can be exported to any format.
True Impact	True Impact is an enhanced measurement and reporting platform that integrates with existing grants management systems. It enables companies to translate their donations into social outcomes and benchmark their performance. Results can be rolled up to calculate the company's aggregate social impact worldwide, and reported in terms of SDG's.
WeSpire	WeSpire's Grants Management functionality will enable a dramatic reduction in the staff time and effort spent ensuring that requests align with regulatory requirements such as Foreign Corrupt Practices Act, Patriot Act, anti-money-laundering and terrorism-supporting statutes. Further efficiences will result from the technology's ability to implement organization custom programmatic criteria to filter for organizations and requests that meet the impact goals of your grantmaking.

Technology and Social Media Capabilities

	America's Charities	Benevity	Blackbaud + YourCause	Bright Funds	Catchafire	CyberGrants	FLUXX	GivingTrax	GlobalGiving	Golden	InvolveSoft	SmartSimple Software	Sponsorium	StratusLIVE	True Impact	VolunteerMatch	WeSpire
Program operates																	
• Online on vendor's servers						X		X	X	X							
• Directly on the client's servers																	
• Via Amazon Web Services	X	X		X			X				X	X			X	X	X
• Clients need assistance to access data																	
• Cloud based or other hosting method (see Page 19)			X		X								X	X			
Social network interfacing																	
• Twitter	X	X	X	X	X	X		X	X	X	X	X				X	X
• LinkedIn	X		X	X	X					X	X	X				X	
• Blogging	X		X	X						X							
• Internal forum	X	X	X	X						X		X					X
• Facebook	X	X	X	X	X	X		X	X	X	X	X				X	
• Google Plus										X							
• Instagram	X				X					X						X	
• YouTube	X		X							X		X					
• Yammer	X	X			X					X							X
• Other (see next page)	X			X	X					X		X					X

Technology and Social Media Capabilities (continued)

Third Party Integration																	
• Yes (if yes, see below)	X	X	X	X	X	X	X	X	X	X	X	X	X		X	X	X
Mobile application available via																	
• Apple iOS	X	X					X		X		X						
• Android		X					X		X		X						
• Windows Phone	X																
• Other (see below)	X	X						X							X		X
Mobile browsing via																	
• Tablet	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
• Smartphone	X	X	X	X	X	X		X	X	X	X	X	X	X	X	X	X
• Other (see below)	X	X	X												X		
Program's integration with social media is																	
• Broadcast platform: run by a few and visible to all										X						X	
• Interactive platform: all employees can actively participate	X	X	X	X		X		X	X	X		X					X
• Other (see page 22)			X		X												

Additional Information: Technology and Social Media Capabilities

Hosting: Other	
America's Charities	Integrates with client organization's other cloud applications using our SmartConnect RESTful API. The transactional API uses JSON, and can feed data into on-premise enterprise systems and even connect data to your social media feeds. Secure, trusted hosting with Amazon Web Services (AWS) is integrated on every level. Our hosting service, AWS, is FedRAMP authorized, follows ISO 27001 best practice guidance and is a PCI DSS Level 1 Service Provider.
Blackbaud + YourCause	Our technology is a SaaS product that operates within a private cloud infrastructure using a Hybrid cloud model - meaning - database used to store all data is only hosting YourCause (client) data.
Catchafire	Rackspace Cloud
SmartSimple Software	SmartSimple provides multi-tenant (public cloud), single-tenant (private cloud), and on-premises (enterprise license). Clients can also combine these to provide more tailored options.
StratusLIVE	Uses a cloud based system.
Third Party Integration	
America's Charities	VolunteerMatch, Guidestar, Internal Revenue Service, Department of Treasury's Office of Foreign Asset Controls, Canadian Revenue Agency, Australian Business Register, The Charity Commission, comprehensive screening options through the Department of Treasury's OFAC list and GuideStar/Candid.
Benevity	VolunteerMatch, Bing Maps
Blackbaud + YourCause	Guidestar, VolunteerMatch, and a number of in-country governmental charity sources
Bright Funds	Guidestar, VolunteerMatch, Stripe, GlobalGiving, CAF America
Catchafire	LinkedIn
CyberGrants	VolunteerMatch, DocuSign, CAFA, IRS, Watchlists, Payroll services, HR/HCM, Accounts Payable systems
FLUXX	We are offering integrations with the following third party data providers: Foundation Center, Foundation Center Geo-Tree, Foundation Center hGrants, Guidestar Charity Check, Guidestar Exchange, LexisNexis Bridger (OFAC), NGO Source (available in 2020), ECB Foreign Exchange Reference Rates, Charity Services Database (NZ only), and CPI Inex (inflation calculation)
GlobalGiving	GuideStar, Benevity, YourCause
Golden	Salesforce, Charity Navigator, Workday, Okta, ADP, Stripe, Paypal, Nationbuilder, Kindful, America's Charities, StratusLIVE
SmartSimple Software	Compliance Support (GuideStar, Charity Navigator, LexisNexis, CSI Web), VolunteerMatch, Google Maps, US Census, Payments (Stripe, PayPal), CRM (Salesforce, Oracle, SugarCRM), Accounting & ERP (SAP, Sage, QuickBooks, Microsoft Dynamics GP, Oracle/PeopleSoft), Digital Signatures (DocuSign, Adobe Sign, SignEAsy, Signority), Zoom, Amazon Alexa, and more.
Sponsorium	GuideStar, LBG

Additional Information: Technology and Social Media Capabilities

True Impact	Co-implements with any system; API integration with CyberGrants, other platforms scheduled for 2020
VolunteerMatch	America's Charities/CauseCast, Benevity, Blackbaud/YourCause, BrightFunds, CyberGrants, SmartSimple, GuideStar, Great Schools, IRS
WeSpire	We have an API integration set up that enables any successful completion of a task, campaign, competition, event or innovation challenge on WeSpire to trigger either kudos or reward points to the Achievers rewards balance that can then be used for their array of perks. One of the features we love about Achievers is the ability to facilitate a donation of points to not-for-profits.
How often information is updated	
America's Charities	Nonprofit data: Updated monthly. May be more frequent if a data alert is received. Platform upgrades/updates: All upgrades are available to the client at least one week (often three weeks) prior to launch through the upgrading of backup servers. This allows clients to review all updates prior to its implementation. Though all upgrades are applied to all servers, the features always require the client to enable them to ensure nothing in the current configuration is changed without client action. Client Content: Clients may update content to promote opportunities at will.
Benevity	Program leads can surface and archive content as required. Benevity's new feature, Content Streams, brings current events and Benevity-created Giving Opportunities directly into the dashboard so your people can discover and explore different causes. Trending Now features content based on major cause-focused awareness dates throughout the year. Your people can learn more about timely opportunities or act quickly when disaster strikes. Popular Causes are curated Giving Opportunities that include trusted and vetted nonprofits delivering impact across broad cause categories.
Blackbaud + YourCause	Real-time
Bright Funds	Data reporting is real-time activity data
Catchafire	All Catchafire managed content (editorial, project templates, webinar content) is updated on a bi-weekly cycle to ensure timeliness. All user generated content and live opportunties are updated in real-time.
CyberGrants	Varies
FLUXX	Any information change in the application is reflected in real time for all other users in the application, providing they have the rights to access it
GivingTrax	Monthly
GlobalGiving	Daily
Golden	Several times per day
SmartSimple Software	In real-time
Sponsorium	Quarterly
StratusLIVE	Data is live the moment it's entered into the system and accessible to clients.
True Impact	Continuously
VolunteerMatch	Our information comes directly from the nonprofit; all listings are required to be refreshed periodically by the organization to ensure they are still relevant.
WeSpire	Daily

Additional Information: Technology and Social Media Capabilities

Social media: Other	
America's Charities	Social sharing capability may be limited to a few employees or opened to all employees depending on the company's policies. Permissions are assigned during implementation.
Benevity	Spark also integrates with Yammer.
Bright Funds	Facebook for Work
CyberGrants	Can integrate with any requested service as needed.
Golden	Anywhere links can be posted
SmartSimple Software	SmartSimple can be both broadcast and interactive, depending on the client's needs and policies. The only limits to social media integration would be those imposed by the social media company, their specific rules, and any API limitations.
WeSpire	Jive and Slack
Mobile apps: Other	
America's Charities	Our Modern Giving solution has an app that is supported for all mobile devices
CyberGrant	Our web app is mobile responsive and will work on any mobile device, tablet or screen size.
GivingTrax	GivingTrax provides a mobile dashboard.
SmartSimple Software	Stand-alone mobile app development is available, each app deployment is made specifically to the requirements of the client.
StratusLIVE	No app is required because our product is fully mobile enabled and responsive.
WeSpire	Native iOs and Android apps launching in 2020.
Mobile browsing: Other	
America's Charities	All our solutions are responsive systems, meaning they can be viewed on monitors of any size.
Benevity	Spark is built using responsive design and is therefore available on all platforms and devices. All modern web browsers are supported and the user experience is as simple, intuitive, and rich for a mobile user as one using a desktop or laptop.
Blackbaud + YourCause	Our platform enables universal access, is entirely mobile responsive, and takes an omnichannel approach to mobile-first engagement. It also supports SSO, basic authentication, and hybrid authentication to maximize flexibility and access.
Golden	All Golden web products are fully responsive
StratusLIVE	Our product is fully mobile-enabled and mobile responsive, and in addition to tablets and smartphones, accessible on all smartwatches.

Additional Information: Technology and Social Media Capabilities

Program integration: Other	
Blackbaud + YourCause	The platform has social sharing capabilities supporting a wide variety of social platforms. Corporations also have the ability to capture images, stories, feedback, or metrics from employees and nonprofit partners.
Catchafire	A broadcast platform in some regard but additionally nonprofits and employees can technically post about their Catchafire work on their own platforms without our input.
SmartSimple Software	SmartSimple can be both broadcast and interactive, depending on client's needs and policies. The only limits to social media integration would be those imposed by the social media company, their specific rules, and any API limitations.
VolunteerMatch	This is dependent on individual client policy

Reporting

	America's Charities	Benevity	Blackbaud + YourCause	Bright Funds	Catchafire	CyberGrants	FLUXX	GivingTrax	GlobalGiving	Golden	InvolveSoft	SmartSimple Software	Sponsorium	StratusLIVE	True Impact	VolunteerMatch	WeSpire
Clients can obtain real-time reports	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
These reports can be obtained																	
• Through online systems and downloaded immediately		X	X	X		X	X	X			X	X	X	X	X	X	X
• By request through the vendor and sent to client									X								
• Other (see next page)	X				X					X							
Clients can build the reports they wish out of all existing variables in the various programs (e.g. request a report on transactions by employees, or totals donated by organization and state)																	
• Yes: independently	X	X	X	X		X	X	X			X	X	X		X	X	X
• Yes: With vendor's help									X								
• No: But vendor can for them					X												
• Other (see next page)										X				X			
• Clients can save reports they create to use again	X	X	X			X	X	X	X		X	X	X		X	X	X
• Clients can create dashboards on their systems	X	X	X	X		X	X	X	X	X	X	X	X		X		X
• Clients can track activity/money by focus area	X	X	X	X		X	X	X	X		X	X	X	X	X	X	X

Additional Information: Reporting

Building reports: other	
America's Charities	Obtained primarily through the online systems for immediate download. Reports are configurable as needed through the online platform. Training and assistance are provided to clients as needed.
Catchafire	They are accessbile via an online dashboard that provides real-time metrics
Golden	Download the raw data and manipulate as you wish
Additional information	
America's Charities	During implementation, we work with clients to determine the needed reports and workflows and configure them into the platform. Clients have capability to modify and build additional reports using the functionality and data fields within the platform. Additional client assistance is available when needed.
Benevity	Our software includes many standard real-time reports on transactions processed through the platform, enabling comprehensive, self-serve reporting. Standard reports include but are not limited to: volunteer hours, insight into participation rates and skills matching for volunteering and rewards. The frequency of any data refreshes are determined by our clients based on specific business requirements (payroll schedule, turnover, etc.). In addition to the standard, out-of-the-box reports available, our clients are able to utilize a wide range of ad hoc reports to track and fine tune their programs. These include reports to see top individuals/departments/locations in terms of hours volunteered (and to compare various subsets of these), top causes based on number of hours tracked by employees (monthly, yearly, campaign totals, etc.), and cause categories (to see what types of issues matter to employees most — health, education, sports/rec, etc.).
BlackBaud + YourCause	We offer a suite of ad-hoc and standard reports and dashboards that can be easily accessed by program administrators. Reporting is accessible in real-time and all standard reports located in the data hub are updated in real-time, with a few reports outside of the hub updating every four hours or nightly. All administrators have acces to standard reports and provide access to our Ad-Hoc Reporting Manager for three users (1 ad-hoc report creator and 2 report viewers) for no additional cost.
Bright Funds	Administrators have access to reporting dashboards that tell a compelling story about the company's social good activities at the corporate and individual level across volunteering, giving (campaigns), and matching. Reports are provided to company-authorized administrators in real-time and downloadable in various formats (such as PDF and CSV) via the Administrative Portal on the Bright Funds Platform, and, upon request, via email. Reports may contain historical data (if provided) and current transactional data. Additionally, Bright Funds has a reporting API that admins can use to pull data into another centralized reporting tool. Custom reports are also available upon request.
Catchafire	Technically clients can track activity/money by focus area but it is a custom ask
CyberGrants	Through impact reports, clients track progress and sucess of programs. Clients can also track programs across both employee giving and grant programs in consolidated reports.

Additional Information: Reporting

FLUXX	One of the benefits of Fluxx is the ability to filter information to support reporting. Records are presented in the form of a card, and any type of card within Fluxx can be filtered by any field on the card iteself or a field on a related record by using cross-card filters, such as country/location. All filtered cards (of a series of cards) become context rich saved queries, or dashboards, from which reporting and progress can be managed with real-time information. These reports can track key statistics, targets, and items at both strategic and operational levels. Additionally, Fluxx has a number of pre-built reporting templates available for clients. These can be very easily used/adjusted as needed. Fluxx's powerful reporting features provide access to cutting edge data visualizations, canned reports, and ad-hoc queries - simplifying the creating of status reports, demographics reports, and more. Fluxx also has developed a secondary database to support the export of data on a nightly basis to reporting servcies like Tableau, Qlik, Crystal, SSRS and others. We can provide a data schema or other appropriate documentaiton identifying the data elements and relationships in the secondary database to facilitate the development of reports.
GivingTrax	GivingTrax provides interactive advanced reporting with drill-down capability into the underlying data along with easy options to export and download data.
Golden	Golden visualizes productivity in real time and can integrate with most third party systems to honor legacy report formats
SmartSimple Software	1) SmartSimple offers OData connectors that can automatically pull the most recent, up-to-date data in saved Excel workbooks or annual reports, as well as BI (business intelligence) tools, such as PowerBI and Tableau, for further analysis. 2) SmartSimple also offers a host of data visualization options for reporting using charts, graphs, and quadrants. 3) SmartSimple's geomapping features can visually overlay grant and giving impact data on interactive maps, which can be optionally linked to publicly and presented on websites.
Sponsorium	There are built-in graphical real-time reports in addition to the thousands of cross-referenced reports that clients may create on their own. All reports can be saved for repeat use and even made allowed for all, or select users to use.
StratusLIVE	Clients can export almost all the fields with underlying data from our system. We also provide an extensive amount of pre-configured reports for their use.
True Impact	True Impact generates custom, presentation-ready board reports (in PowerPoint) as part of every subscription. Data include calculations of social imapct, social return on investment, leverage, and data quality.
VolunteerMatch	We have an impact tab that shows the performance in real time based on goals set by the company that is accessible to everyone.
WeSpire	WeSpire's licensing model provides high levels of customer success support and analytics that prove the business value of volunteering, giving, and other social impact programs on HR outcomes (retention, referral, and performance).
YourCause	YourCause offers an Ad-Hoc Report manager to provide both standard and custom dashboards, empower clients to develop their own custom reports and create permission-based dashboards, and quickly view KPIs across all programs. Additionally, standard reports give clients quick access to the most common metrics. YourCause's Data and Insights team is available for more complex reporting needs or custom benchmarking reports.

Vetting, Compliance, and Security Capabilities

Vendor has capacity to	America's Charities	Benevity	Blackbaud + YourCause	Bright Funds	Catchafire	CyberGrants	FLUXX	GivingTrax	GlobalGiving	Golden	InvolveSoft	SmartSimple Software	Sponsorium	StratusLIVE	True Impact	VolunteerMatch	WeSpire
• Vet nonprofits for U.S. Patriot Act compliance	X	X	X	X		X	X	X	X	X		X	X	X		X	X
• Vet nonprofits for IRS compliance	X	X	X	X		X	X	X	X	X	X	X	X	X		X	X
• Vet requests according to internal program guidelines (e.g. employee edibility, annual maximums, religious, etc.)	X	X	X	X		X	X	X	X	X		X	X	X		X	X
• Check international organizations' compliance with relevant IRS regulations	X	X	X	X		X	X	X	X	X		X	X	X		X	X
• Other (see next page)	X			X	X	X	X		X	X							
• Let clients override default settings to customize higher levels of security		X	X	X		X	X	X	X	X	X	X	X	X			X
• Let clients set different levels of access for users of the program	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
• Comply with the requirements under the General Data Protection Regulation (GDPR)	X	X	X	X	X	X	X	X	X	X	X	X	X		X	X	X

Additional Information: Vetting, Compliance, and Security Capabilities

Nonprofit vetting	
America's Charities	We've built in comprehensive screening options through the Treasury Department's OFAC list and GuideStar/Candid. We also integrate with various international tax authorities to verify charitable status: Internal Revenue Service (IRS), Canadian Revenue Agency (CRA), Australian Business Register, The Charity Commission. We also partner with GlobalGiving for international charity vetting and funds distribution. Additional vetting for international nonprofits includes IRS equivalency determination, compliance standards in country of origin, financial review, executive leadership and board review, website, and other material documents review, and more.
Bright Funds	Bright Funds partners with Guidestar to provide a comprehensive list of all US-based 501c3s that are in good-standing with the IRS. Additionally, Bright Funds can add supplemental layers of vetting if that is a requirement of the partner company, including whitelisting based on specific criteria and facilitating thorough nonprofit nomination capabilities.
Catchafire	We handle due diligence vetting upon request.
CyberGrants	In addition to CAFA and IRS vetting, we also vet against the following: Australian Business Register, Canadian Registered Charities in England and Wales National Center for Education Statistics.
FLUXX	The Fluxx solution can be configured to either manually or automatically check the tax status of an organization via GuideStar or check for SDN flags of organizations, multiple people or bank accounts via Bridger. The results will be displayed/updated within Fluxx in real time. Fluxx offers integration with third party tools (e.g. Bridger) to facilitate OFAC, denied parties, and other watch list checks. FLUXX has created integrations with both OFAC and Foundation Center databases to create a unified user interface for the users. These are set up using our APIs, pulling a one-way feed of information into Fluxx from the third pary systems. There is also the ability to configure a warning that would appear on all records related to a flagged organization or person.
Golden	We have a partnership with Charity Navigator for validating charitable institutions and for crediting productivity calculated through our system to count toward achieving new Charity Navigator ratings. Golden has live, integrated background checking for federal criminal, county criminal, sex offender, watch list, identity theft, document checking, and driver record checking. Golden does independent research above and beyond databases to understand the quality of formal organizations. Golden works across sector in an ecosystem fashion with nonprofits, foundations, governments, companies, educational institutions, religious groups, and other groups to help surface strong organizers and their content.
VolunteerMatch	We can vet non-profits for US Patriot Act compliance and IRS compliance, as well as requests according to internal program guidelines (e.g. employee eligibility, annual maximums, religious, etc.)

Additional Information: Vetting, Compliance, and Security Capabilities

Additional comments	
America's Charities	Our reporting system has the following characteristics: All reporting functionality is available within the standard interface. The creation of reports is restricted to users with the Manager Permission for reports. Role-based security defines who can reivew reports. Reports can be designated as "Internet Enabled" (available via a URL to certain stakeholders, either with or without a password) and linked to public websites. The solution has a number of features to support GDPR while providing the high auditability and transparency standards required by this framework. The client's data categorization model can be enabled in the system through the system with Global Settings, Security and Data Categories to establish your model within the platform. For example, a data categorization model could include Personally Identifiable Information (Social Security Number, Birthdate, First and Last Name, etc.), Confidential, etc. Each category is linked to one or more policy you define in addition to linked to the actual data fields that fall under the category. An important feature of Data Category is the ability to use Pseudonymization. Pseudonymization provides the ability to anonymize a field value to the user through the use of a mask. The data mask describes how much of the field value should be masked from the user. If a field value is anticipated to be 11 characters and the mask length is set to 9 then only the last two characters of the value would be displayed. The client's policies on data management will define how data is managed in a category. Typically, there are two policies for each category: Retention policy - defining how long your organization will need to retain the data of this category in the system before it is erased, Security policy - defining who can see and/or modify the data of this category in the system. Security policies support the platform's Role-Based security; After you have set up the categories and policies, you then attach the fields to each category. Once the fields are connected to the category, the security will become effective.
Benevity	At Benevity, compliance, risk management and security are a state of mind, and not just a checklist. As a global company in the business of Goodness, our products and services are regulated beyond the North American landscape. We have been working hard from our earliest days to make significant investments in our security and compliance practices, providing you with the assurance that your data is safeguarded and that you are partnering with the leader in our society.
BlackBaud + YourCause	The protection of client data and the overall security of the company's software, hardware, and network is the foundation for the actions thats are taken by the YourCause/Blackbaud Security Team. The has developed a series of programs and policies that are designed to comply and protect all data that is captured, processed, viewed, and stored throughout the course of of business. The policies range from a general information Security Policy, Data Sensitivity POlicy, and Employee Ethics Policy, to policies pertaining to engineering and product development using the stated Secure Development Life Cycle, and the phsyical and virtual security infrastructure in place to do so; and includes definitions for the handling and responsibilities of all client data within each employee's handbook and individual security training requiredments. Ina ddition to these policies and practices, additional measures to ensure the protection of PII include: databases protected with various physical, technical and procedural measures, restircted access to information by unauthorized persons, and ongoing training to all employees about their responsibility to protect customer data and provide them with appropriate guidelines for adhering to our company's business ethics standards and confidentiality policies.
Bright Funds	Bright Funds is a SOC Type 2 compliant. Bright Funds product development process has explicit steps to ensure security (application, and the data), and each piece of code has to go through peer review. Bright Funds applications are tested for security vulnerabilities before deployments to production and then, on an on-going basis, they run tests to check for issues. Bright Funds also has different systems in place to be monitoring any issues on the application.
CyberGrants	CyberGrants has a set of policies, procedures, and controls which ensure this security on an ongoing basis, and they conduct annual third party audits to ensure the efficacy of these controls. On an ongoing basis, CyberGrants maintains and enhances their infrastructure to address any new or emerging security threats. In addition, CyberGrants conducts regular third party vulnerability scans and penetration tests (both network and application) to further certify their system against the latest security threats and vulnerabilities.

Additional Information: Vetting, Compliance, and Security Capabilities

FLUXX	Fluxx is built on cloud infrastructure and hosted on Amazon Web Services (AWS), ensuring that clients can run its systems in the cloud with complete confidence. Taking advantage of the AWS infrastructure platform, Fluxx maintains comprehensive data privacy, data management, security and availability standards. We take a number of steps to protect security and prevent data breaches. **Application Security:** Manage permissions and access to data and functionality for all user using role-based access; Confidently access Fluxx from anywhere through SSL encryption for user logins and all subsequent data; and Based on client configuration preferences, Fluxx ensures that end-users can only access the application, not the back-end Admin module. **Operational Security:** Fluxx employs stringent 24/7 monitoring tools, controls, and policies to ensure that it provides the strongest security for its customers; and Administrative access to Fluxx's AWS resources is controlled using security controls available in AWS, including physical security of hardware and networking. Access to the underlying servers is limited to a very small number of trusted staff locations; and all operational access to the underlying infrastructure is restricted by a firewall and two-factor authentication. **Data Management:** Client data is stored in AWS's managed SQL database service (RDS) an configured to synchronously replicate to a secondary data center that will automatically failover in the event of a primary data center outage or server failure. Backups provide 30 days of point in time recovery and weekly snapshots are retained for up to one year.

GlobalGiving	We collect information from you when you visit and take actions on our website. We use this information to provide the services you've requested. We use cookies (such as Google Analytics) to provide a better experience and improve our website and web beacons and similar technologies to track usuage patterns and conduct marketing.
	    You can access your data, edit your preferences, downloads your data, or revoke consent by visiting your account. Except for the purposes outlined below, we will not trade, share, or sell your personal data with anyone. Refer to the policy for complete details.
	    Our privacy policy takes into account the requirements of the General Data Protection Regulation (GDPR). If you are based in the European Economic Area, we will transfer your personal data to the United States pursuant Standard contractual clauses for personal data transfer to third countries.
	    If personally identifying information is sent to a corporate client it is always protected by encryption.

Golden	We undergo regular, independent security reviews with accredited partners. We reguarly undergo security reviews to support the work of our regulated partners, which include the governments of the State of California and two of the four largest cities in the USA. We are also ADA compatible.
InvolveSoft	We have custom SSO integrations depending upon your firewalls.
SmartSimple Software	We include technical and procedural elements, which enable clients to produce GDPR-compliant systems including: General GDPR Introduction, Data Residency, Psuedonymization, Policies, Retention Policies, Auto Erase Details, Validation of Contact Removal, Privacy and Security Policies, Enforcing End user Agreement, Request Tracker, and Reporting.It is SmartSimple's corporate policy to store all client data in the same jurisdiction as the client's head office unless the client explicity requests the data to be stored in another jurisdiction; GDPR 2016/679 compliance will be adhered to. Attribute Based Access Control (ABAC) in combination with standard Role Based Access Control (RBAC) dictates everything from user portal and application access to the ability to view and modify the contents down to specific fields. These controls extend past the user role, and encompasses the context (location, time of day, material to be accessed, unique data retention policy and other attributes) and ensures GDPR compliance to the data field level.
Sponsorium	Sponsorium maintains all necessary certifications and have a dedicated security officer to continuously revisit procedures. Clients can override default settings to customize higher levels of security. Clients can set different levels of access for users of the program. Vendor complies with the requirements under the General Data Protection Regulation (GDPR).
StratusLIVE	StratusLIVE has dedicated clustered firewalls handling the network segmentation. Firewall rules are built on a least privilege basis to allow only the required traffic in and out of the network. All swutches and storage arrays are set up in a redundant high available configuration. The Platform backend is multi-tenant. There is one IIS site per Workplace Giving Organization. Each tenant has separate data folders, user databases, and SQL databases to isolate the tenant data.
True Impact	We use industry-standard protocols, required by our Fortune 500 clientele.

Customization

	America's Charities	Benevity	Blackbaud + YourCause	Bright Funds	Catchafire	CyberGrants	FLUXX	GivingTrax	GlobalGiving	Golden	InvolveSoft	SmartSimple Software	Sponsorium	StratusLIVE	True Impact	VolunteerMatch	WeSpire
Programs are customizable according to a particular customer's needs																	
• Yes: Completely	X	X				X		X		X		X	X	X	X		X
• Yes: Partially			X	X	X		X		X		X					X	
Customization logistics																	
• Vendor customizes the software during implementation	X	X	X	X		X	X	X	X	X		X	X	X	X	X	X
• Vendor modifies the program as required	X		X	X		X		X	X	X		X	X	X	X		X
• The customer can make ad-hoc changes without the vendor's help	X	X	X	X		X		X		X		X	X	X		X	X
• Other (next page)	X				X			X		X	X						X
Clients can modify the content of their program websites																	
• Clients can manage this independently	X	X	X	X		X	X	X		X	X	X	X	X		X	X
• Vendor provides the modification at the client's online request		X	X	X	X				X						X		
Clients can modify the layout of their program websites																	
• Clients can manage this independently	X	X	X	X		X	X	X		X		X	X	X			X
• Vendor provides the modification at the client's online request		X	X	X	X				X				X	X	X		

Additional Information: Customization

Program customization	
America's Charities	America's Charities offers several giving, volunteering, and engagement technology solutions, all of which are packaged with full customer support. The solutions our clients use are based on their individual needs rather than a one-size-fits-all solution. We then customize the solution during implementation, and we modify the program as required by client. The client can also make ad-hoc changes without our help. In addition to initial training, we provide a client resource library to all clients with templates, tools, and best practice information. Based on client needs, the platform is configured during implementation. Modifications may be made as needed. The customer may also make changes with minimal or no assistance after training is provided.
Benevity	As a SaaS application, Spark relies on configurability instead of customization. With hundreds of configurable options, Spark is well positioned to handle most, if not all, program or business requirements. Spark was designed to be easy (and yes, even fun) to use, and even easier to manage by a client administrator, so the solution components such as giving and volunteer opportunities, news item management, etc. are generally handled by the client (although we are always here to support you). However, if your team would prefer to perform more advanced configuration changes, such as payroll and budget adjustments, then they are welcome to manage these processes, with the right training. It's been our experience that while most of our client administrators prefer to manage content within their site, they leave the more technical elements to the Benevity Client Services team (who you will have regular contact - and a relationship - with).
BlackBaud + YourCause	Our platform is meant to reflect the client's brand, programs, and culture. Options include client logos and branding, segmentable user experiences, engagement elements, and more.
Bright Funds	Bright Funds has a standardized core architecture with a high-level of configurability that aims to strike the balance between the scalability and reliability that is required across all partners, yet accommodates the unique requirements (as relates to branding, program parameters) of individual companies.
Catchafire	We work with our partners to align on how we can leverage our range of products and services to best meet their needs.
FLUXX	The Fluxx platform is designed to be highly configurable, reducing the need for custom development while addressing a wide range of use cases and workflow scenarios. If custom development is desired, Fluxx has a team of dedicated experts to scope and deliver and custom build.
GivingTrax	GivingTrax is a cloud software. Most capabilities are configurable using a set-up tool. Unique customizations are available, if desired.
Golden	Golden is designed to be turnkey to implement. In practice, large enterprises like to spec out how Golden integrates with SSO, HRM, sometimes CMS, Payroll and other systems. We work with IT teams to do this, as well as corporate officers for security review, regulatory compliance, and legal review.
InvolveSoft	Our product is built in a modular fashion so the customer can turn certain modules on and off depending on their program.
SmartSimple Software	SmartSimple's system is completely based on configuration not customization. Everything offered within SmartSimple is configurable from the data model through applications, including workflows and user portals. The configurable nature of the platform means that no programming or coding is required to modify or extend the solution, resulting in a lower total cost of ownership over time and decreased dependecy on IT. This fact empowers SmartSimple's clients to engage in activities like implementing new grant programs, modifying existing programs, managing communication templates, and more, without vendor involvement.
StratusLIVE	Clients can configure their program to match their corporate brand, link to other websites off their main portal, and configure giving and volunteering processes to fit their needs best.
WeSpire	The WeSpire platform is fully customizable to meet the needs of the organization.
VolunteerMatch	Most of our options are out of the box compatible, but we do have some additional services such as Single-Day-Sign-On that may be customized to work with a specific client's needs.

Additional Information: Customization

Additional comments	
America's Charities	**Built-in Connectivity** — Our web-based platforms are accessible from any major browser anywhere, anytime. Our built-in integration and custom connectivity options offer rich interoperability, including OData, providing clients with the ability to publish their data direct to their communities. Standard integrations — Our built-in integrations extend the capabilities of our platform: Auto populate grant applications with grantee details and verify nonprofit tax status with GuideStar and Charity Navigator. Find statistics through the US Census Bureau, accept online payments with Stripe and PayPal, and sign documents online with Adobe Sign and DocuSign. **Custom Connectivity** — Integrate our platform with your organization's other cloud applications using our SmartConnect RESTful API. The transactional API uses JSON, and can feed data into your on-premise enterprise systems and even connect data to your social media feeds. **Endlessly configurable platform** — Our Universal Tracking Application (UTA) enable sthe tracking and management of any process. Multiple UTAs can be actively linked, so data is shared across the platform. Automate your organization's workflowswith our Workflow Automation process, modifying and branching as neeed. Set roles and permissions according to your business model. Create data categories for role for multiple levels of permissions. Field data visibility is fully controlled, so users can only see and edit what they have permission for. **Robust localization features** — The platform offers native multi-language, multi-currency, and multi-time zone features, including dynamic translations for more than 20 languages.
Bright Funds	Most elements of the Bright Funds platform are highly configurable and partners work with their dedicated Client Experience team to ensure that those changes are met. For each partner, Bright Funds incorporates specific brand assets and custom program language.
CyberGrants	CyberGrants' platform is highly customizable, providing for flexibility of complex programs and large organizations.
FLUXX	Fluxx is designed to be a highly configurable solution where the Fluxx project team leverages an administrator panel in Fluxx to "build" solutions for our clients. We will agree on and collaborate on configurable aspects of the system during the implementation process. Post-implementation Fluxx's Admin Module gives full creative control and governance over the Grantmaker site to client's staff Admin users for ongoing configurations. Through the powerful workflow, document, and settings capabilities, the Administrators will be able to manage all of a client's relationships, records, and systems - all through a drag and drop interface. This includes full configuration of application forms, grantee forms and documents, workflows, agreements, automated emails,letters, etc.
GlobalGiving	GlobalGiving can offer custom landing pages, which are designed and configured in-house. GlobalGiving also offers fundraiser pages to facilitate peer-to-peer giving, and these can be created by employees.
Sponsorium	Everything from external branding to internal configuration and user permissions is at the customer's fingertips.

Customer Service

	America's Charities	Benevity	Blackbaud + YourCause	Bright Funds	Catchafire	CyberGrants	FLUXX	GivingTrax	GlobalGiving	Golden	InvolveSoft	SmartSimple Software	Sponsorium	StratusLIVE	True Impact	VolunteerMatch	WeSpire
Customer service guaranteed turnaround time (see next page)	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Typical response to customer service issues																	
• <60 minutes								X		X			X	X			
• 1-3 hours	X		X	X	X	X	X		X		X	X			X	X	X
• 3+ hours		X															
Support channels offered																	
• Phone support	X	X	X		X	X		X	X	X		X	X	X	X	X	X
• Web support (chat)	X	X	X	X	X		X	X	X	X	X	X		X		X	
• System documentation	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
• In-person training	X	X	X	X	X	X	X	X		X	X	X	X	X	X		X
• Training materials	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
• Vendor has the capacity to send mass emails to employees on behalf of the giving/volunteering program	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
• Vendor has the capacity to send mass emails to nonprofit partners on behalf of the volunteering/giving program	X	X	X	X	X	X	X	X	X	X	X	X	X		X		X

Additional Information: Customer Service

Customer service guaranteed turn-around time	
America's Charities	An immediate acknowledgment of inquiry is sent and ticket is established and shared with client via email. Customer support usually response within 24 to 48 hours with proposed next steps. Resolutions typically occur within one week. Simple requests may be resolved sooner.
Blackbaud + YourCause	2 hour callback guaranteed
Bright Funds	Within 1 business day
Catchafire	Within 24 hours Monday - Friday
CyberGrants	Based on clients SLA
FLUXX	Urgent tickets typically receive a response within 1-4 hours of receipt, depending on the urgency level. For all non-urgent issues, we typically provide an initial response within 1-2 business days (non-urgent emails received over weekends or holidays will be addressed during the following business day).
GivingTrax	2 hours
GlobalGiving	Varies upon corporate partnership.
Golden	8 hours
InvolveSoft	We have different levels of severity for customer support issues, normally 2 business days for low-priority
Sponsorium	All phone calls are answered within three rings, all emails responded to within three hours.
StratusLIVE	The response and resolution time for all support tickets are determined by their severity using SmartSimple's impact classification. **Critical Condition** - Responses by phone and email within 30 minutes with a correction or bypass provided within 24 hours. **High Impact Condition** - Response by phone or email within 2 hours with a correction or bypass provided within 8 hours. If bypassed, a correction will be provided within 48 hours. **Medium Impact Condition** - Response by phone or email within 4 hours with a correction or bypass provided by the end of the work week. If bypassed, a correction will be provided by the end of the work week. If bypassed, a correction will be provided within 4 days. Low Impact Condition - Response by email within 2 business days.
True Impact	1 business day
WeSpire	24 business hours
VolunteerMatch	One business day unless critical issue related to our SLA which is a shorter time-frame.

Pricing

	America's Charities	Benevity	Blackbaud + YourCause	Bright Funds	Catchafire	CyberGrants	FLUXX	GivingTrax	GlobalGiving	Golden	InvolveSoft	SmartSimple Software	Sponsorium	StratusLIVE	True Impact	VolunteerMatch	WeSpire
Pricing for products is determined by																	
• Set up fee					X		X		X								
• Subscription fee		X		X	X		X	X		X			X	X	X		
• Deducting percentage from each transaction																	
• Paying by usage																	
• Licensing fees											X						X
• Other (see next page)	X		X			X							X			X	
Clients are billed																	
• Monthly		X						X		X							
• Annually					X	X	X				X	X	X	X	X	X	X
• Per service																	
• Other (see next page)	X		X	X				X	X								
Training costs																	
• Training costs are included in the vendor's standard fees	X	X	X	X	X		X	X	X	X		X	X	X	X	X	X
• Training is an additional cost						X					X			X			
• Other (see next page)																	

Additional Information: Pricing

Price determination: Other	
America's Charities	Fees for Employee Engagement, giving and Volunteering include a one-time set-up fee and a recurring annual servie fee. These fees are determined based on the total count of eligible employees. Licensing fees are included in the annual service fee. Funds Management Fees are a percentage of pledged contributions. Percentage amounts deducted are based on volume of contributions. Grants management and other more customized solutions are added fees based on grant volume and number of distributions.
Blackbaud + YourCause	YourCause offers flexible billing terms.
CyberGrants	Varies based on combination of the above.
GlobalGiving	Varies based on corporate partnership.
SmartSimple Software	Set up fee & pay by usage
VolunteerMatch	Depends on products/service. YourMatch is a licensing fee. Our Open Network is available through partners via a subscription service.
Billing: Other	
America's Charities	Implementation (set-up) fees are due upon contract approval. Annual services fees -- paid in full at time of contract or monthly invoicing. Funds Management fees - quarterly or monthly depending upon agreed upon frequency of distribution. Other fees are invoiced as agreed upon with client.
Blackbaud + YourCause	YourCause offers flexible billing terms.
Bright Funds	Clients are billed annually for the annual hosting fee. Clients are also billed monthly for matching donations and any incurred transaction fees.
GivingTrax	Annual invoicing is available, if desired
Training: Other	
CyberGrants	Training is included during implementation, but additional training is available at an additional cost via online or in person.
FLUXX	Initial admin and end user training is included in the implementation fee, additional training can be purchased as needed.
Sponsorium	Initial implementation and training costs are included in first year invoice. Additional in-depth training is quoted based on number of hours required.

Additional Information: Pricing

Average cost/range of prices for program	
America's Charities	Average fees currently from $7,500 to $10,000.
Benevity	Benevity's subscription model is quoted based on the number of employees that a client has (instead of the number of active users) so that their program has unlimited space to grow while eliminating the risk of increased costs when they see program success.
BlackBaud + YourCause	YourCause's pricing is based on the total number of employees who have access to the platform and the features implemented.
Bright Funds	Depending on specifics of program; can provide pricing upon request.
CyberGrants	Pricing is based on a number of factors and whether or not a client is engaging CyberGrants for cash grant software and services, employee engagement software and services, or both. CyberGrants works with prospects to determine a solution and provide custom pricing accordingly. Depending on the nature of the relationship, CyberGrants may have a combination of annual usage fees and monthly transaction fees. The average cost can vary widely due to the nature of each client relationship. Some smaller implementations are only a few thousand dollars a year. Other relationships are significantly higher because of transaction volumes, additional service offerings, product customizations.
FLUXX	The average cost of Fluxx Grantmakers can vary based on individual client needs. Fluxx works with grantmakers who are just starting their giving journey to some of the largest funders in the world who fund $500 million annually and more. The system needs of these clients use can vary considerably. We offer a starter solution that covers the core needs of a grant making solution at an attractive price point and can scale the product up to accommodate more sophisticated needs. There are two components to pricing - annual subscription and one-time implementation. The subscription fee includes the hosted platform, ongoing support, and continual product improvements. The implementation fees will be articulated in detail as a mutually agreed upon SOW.
GivingTrax	Tiered pricing is based on the number of employees for employee giving and volunteerism solution. For contributions made in GivingTrax, we offer the unique ability to disburse funds in as little as 2 hours
GlobalGiving	Corporate program fees vary depending on the services offered. Vetting services have fees that range from $250/organization to $750/organization and our corporate giving pages have fees ranging from $1,000 to $3,000.
Golden	Freemium SaaS. Many organizers use Golden Dashboards for free. Many others choose a software tier.
SmartSimple Software	Costs can range between $15,000- $125,000 based primarily on the effort required to meet very specific requirements.
Sponsorium	Pricing is available upon request.
StratusLIVE	Our pricing is an annual subscription fee. There are no data migration fees. Training, customer service, and account management are included in the annual fee. Our pricing is transparent and tiered based on the total number of employees utilizing the platform.
True Impact	Varies.
VolunteerMatch	$5,000-20,000
WeSpire	Pricing depends on eligible users and modules purchased.

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