

3rd Party Preferred Processing Goal Summary Sheet/Comparison

Corporate Partnership Strategy: Provide support to our corporate partners in creating technology pathways that meet their CSR/Engagement needs establishes United Way as an important role in the value chain between corporations and processors.

United Way Alignment Strategy: Align campaign processing solutions in order to make giving to United Way (reporting, recognition, relationship building and recovery of costs) as efficient, relevant and easy as possible in connecting donors to United Way.

Potential Goals and Expected Deliverables	FrontStream/ Truist	YourCause
3rd Party Preferred Partner Agreement in Place: Produce a preferred list of third-party processing vendors to use as a guide with the field	✓	✓
Multi Market Processing Guide in Place: For United Ways serving as Processor	✓	✓
Reseller Tools in Place: For United Ways signing processing agreement with companies and needing a Campaign/processing tool to use on the back end.	✓	soon
Align REPORTING across third-party processor in order to produce uniform where raised data from all sources. <div> <div>Real Time Stats</div> <div>United Way Geography</div> <div>Geographic Breakouts</div> <div>Where Raised Reporting</div> <div>Employee Type Breakouts</div> <div>Designation Reporting</div> <div>Department Breakouts</div> <div>Total Campaign Reports</div> <div>Customization</div> <div>Format flexibility</div> </div>	✓	✓
Recognition: Our processing partners are capable and willing to ensure proper donor/individual recognition (i.e. Donor Receipting, Donor Recognition to Agency/UW)	✓	✓
Fully integrated corporate philanthropy solution in partnership with the United Way model (e.g. volunteer solutions integrated with giving portal).	✓	TBD
Support mobile integration across giving platforms as well as support a more integrated suite of services to make the process more accessible/easier.	✓	✓
Normalize Product Costs: Control the costs associated with using third-party processors as part of the philanthropic experience for companies.	✓	✓
Cost Recovery/Normalize UW product costs: Ensure UW and agency interests and investment of human resources are recoupable.	✓	✓
Agreement on use of iGuide: Bring iGuide In house - Re Engineer iGuide and ensure it is incorporated across preferred partners. iGuide managed inhouse by UWW in 2016.	✓	✓
International giving mechanism: Reach agreement on International Giving Database, distribution portal through International United Ways and international "iGuide".	TBD	✓
Collaborative campaign and communications strategies (i.e. webinars sales calls and trainings). This includes ensuring that customer services standards are met and surpassed.	✓	✓
Fiscal Agent Role	✓	✓
Standardized services such as credit card processing guidelines, etc.	✓	✓
3rd Party Preferred Partner Agreement in Place: Produce a preferred list of third-party processing vendors to use as a guide with the field	✓	✓



Announcement #1
United Way Worldwide and YourCause Sign Preferred Provider Agreement
February 2016

We are excited to announce that United Way Worldwide and YourCause have signed a Preferred Provider Agreement.

The overall strategy of a Preferred Provider Agreement (PPA) is to improve United Way processed campaigns by identifying 'best in class' standards for vendors providing services to our corporate partners and network United Ways. A growing number of our corporate partners are seeking advice from United Way on processors; and to that end, United Way Worldwide has identified YourCause as one of the key partners to help our corporate partners fulfill their Corporate Social Responsibility (CSR) goals and ensure proper/timely recognition of their employees.

The lack of donor information is the primary barrier for retaining donors across the United Way Network. We will leverage this partnership using both a proactive and strategic lens to overcoming such barriers as well as working on common solutions that better position United Way as a "partner of choice" in helping to provide individual and corporate philanthropic tools that best meet CSR and individual engagement needs. In addition to the many benefits defined within the PPA (summarized below), YourCause will provide some additional benefits, highlighted in red below (with more to come).

YourCause is one of the leading enterprise employee engagement platforms within the Corporate Social Responsibility (CSR) space, offering a software-as-a-service solution to more than 3.5 million employees in 150+ countries from nearly 100 clients.

The YourCause platform is a mobile friendly one-stop-shop, which can be easily configured to fit a client's needs resulting in a technology solution optimized for each company's programs and culture. More than just a technology company, YourCause provides best-in-class customer service and account management and leverages the data captured within our platform to help our client manage and grow their programs.

- YourCause's technology is ever-evolving, with new features designed through collaboration with our clients and partners.
- YourCause's flexible ad-hoc reporting manager give clients access to a robust set of tools to create custom reports and apply visualizations that make interpreting data a breeze.
- YourCause is one of the few companies who refuses to take a percentage of donations to fund our platform, instead utilizing a model that is focused on maximizing donations to charities.

To Learn More about YourCause platform, please visit <http://csrconnect.me/> .

Below are some of the many benefits defined within the PPA:

Benefits to our Corporate Partners of United Way Preferred Processing Partners:

- ✓ Consult for best in class service recommendations aligned with company's CSR Goals
- ✓ Corporate leadership support in coordinating campaign setup, partnership and deliverables for campaign and philanthropy
- ✓ Greater efficiency achieved in working with company as partners vs. engaging separately



- ✓ Quick and immediate alignment for onsite relationship role of United Way with technical implementation of Campaign/processing tool
- ✓ Data protection standards aligned with industry standards
- ✓ Audit standards aligned with industry standards
- ✓ Additional international gateway payment option for corporate partners.
- ✓ Reduction in fees and price points associated with the payment gateway.

Benefits to United Way:

- ✓ Positions UW as a valued philanthropic partner not simply a campaign processor
- ✓ Reporting details in a standard format
- ✓ Timely and comprehensive release of donor data
- ✓ Cost recovery model incorporated into processing protocols (where applicable/appropriate)
- ✓ Consultation for local United Ways who need Third party processor partnership help
- ✓ Data protection standards aligned with industry standards
- ✓ Audit standards aligned with industry standards
- ✓ Service level agreements / customer service
- ✓ Access to payment details via provider's portal

Benefits to Processor/Vendor:

- ✓ Recommended by United Ways consulting with Corporate Partners (as appropriate/applicable) and potentially position them ahead of non-preferred vendors
- ✓ Continuous quality feedback loop from United Ways in order to remain competitive
- ✓ On the ground relationship staffing (local United Ways onsite Campaign Partnership at Companies) providing direct support to corporate campaigns as an extension to the vendor's acct support team (i.e., this role serves as extra "feet on the ground" for vendors who would not have active onsite account reps servicing companies)
- ✓ Resources on United Way Online: (private groups) and UWW Network access to potential new business advertisement and partnership development (i.e. direct portal to offer new services to the network);
- ✓ Fiscal agent agreement / simplified receipting
- ✓ Access to UWW Corporate Relations team for sharing of product information, relationship building
- ✓ Simplifies processing challenges by working collaboratively with UW

It is important to note that our partnership with YourCause is not intended to supersede prioritization of United Ways serving the role as processor. We continue to partner with United Ways serving in this role and will include these United Ways, when appropriate, as an option when it comes to recommendations for processing partners.

Should you have any questions about this Preferred Provider Agreement, please contact Karen Adams-Snyder, Director, Campaign Operations at karen.snyder@uww.unitedway.org.



Announcement #2

United Way Worldwide and FrontStream Sign Preferred Provider Agreement

February 2016

We are excited to announce that United Way Worldwide and FrontStream have signed a Preferred Provider Agreement.

The overall strategy of a Preferred Provider Agreement (PPA) is to improve United Way processed campaigns by identifying 'best in class' standards for vendors providing services to our corporate partners and network United Ways. A growing number of our corporate partners are seeking advice from United Way on processors; and to that end, United Way Worldwide has identified FrontStream as one of the key partners to help our corporate partners fulfill their Corporate Social Responsibility (CSR) goals and ensure proper/timely recognition of their employees.

The lack of donor information is the primary barrier for retaining donors across the United Way Network. We will leverage this partnership using both a proactive and strategic lens to overcoming such barriers as well as working on common solutions that better position United Way as a "partner of choice" in helping to provide individual and corporate philanthropic tools that best meet CSR and individual engagement needs. We have been partnering closely with FrontStream for a while and they have been working diligently to enhance their platform for the benefit of the United Way programs. We are excited that these enhancements will be soon be live and ready for use by our corporate partners and local United Ways.

The PPA with FrontStream will include many of the same benefits that were previously defined in the Master Services Agreement (MSA) United Way had with TRUiST.

Supplementary to the benefits outlined within the PPA, FrontStream also provides an all-in-one Campaign Management Platform. In addition to having employee payroll giving, volunteering, and corporate gift matching all in one place, FrontStream offers a comprehensive suite of modules to facilitate a wide range of CSR efforts including:

- Peer-to-peer fundraising and "a-thon" campaigns
- Event ticketing and online, mobile, and live auction
- Project based fundraising and awareness month campaigns
- Disaster relief fundraising
- Tribute and in-memoriam donations

FrontStream is also pleased to offer companies an in-kind donation and sponsorship management solution. This tool allows corporations and other organizations to create submission pages for managing requests for in-kind donations or sponsorships, as well as streamlines the process for collecting and managing requests while providing complete management reporting.

To learn more about FrontStream's enhanced Campaign Management, visit:

<http://www.frontstream.com/CM>

Below are some of the many benefits defined within the PPA:

**Benefits to our Corporate Partners of United Way Preferred Processing Partners:**

- ✓ Consult for best in class service recommendations aligned with company's CSR Goals
- ✓ Corporate leadership support in coordinating campaign setup, partnership and deliverables for campaign and philanthropy
- ✓ Greater efficiency achieved in working with company as partners vs. engaging separately
- ✓ Quick and immediate alignment for onsite relationship role of United Way with technical implementation of Campaign/processing tool
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Benefits to United Way:

- ✓ Positions UW as a valued philanthropic partner not simply a campaign processor
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Benefits to Processor/Vendor:

- ✓ Recommended by United Ways consulting with Corporate Partners (as appropriate/applicable) and potentially position them ahead of non-preferred vendors
- ✓ Continuous quality feedback loop from United Ways in order to remain competitive
- ✓ On the ground relationship staffing (local United Ways onsite Campaign Partnership at Companies) providing direct support to corporate campaigns as an extension to the vendor's acct support team (i.e., this role serves as extra "feet on the ground" for vendors who would not have active onsite account reps servicing companies)
- ✓ Resources on United Way Online: (private groups) and UWW Network access to potential new business advertisement and partnership development (i.e. direct portal to offer new services to the network);
- ✓ Fiscal agent agreement / simplified receipting
- ✓ Access to UWW Corporate Relations team for sharing of product information, relationship building
- ✓ Simplifies processing challenges by working collaboratively with UW

It is important to note that our partnership with FrontStream is not intended to supersede prioritization of United Ways serving the role as processor. We continue to partner with United Ways serving in this role and will include these United Ways, when appropriate, as an option when it comes to recommendations for processing partners.

Should you have any questions about this Preferred Provider Agreement, please contact Karen Adams-Snyder, Director, Campaign Operations at karen.snyder@uww.unitedway.org.