



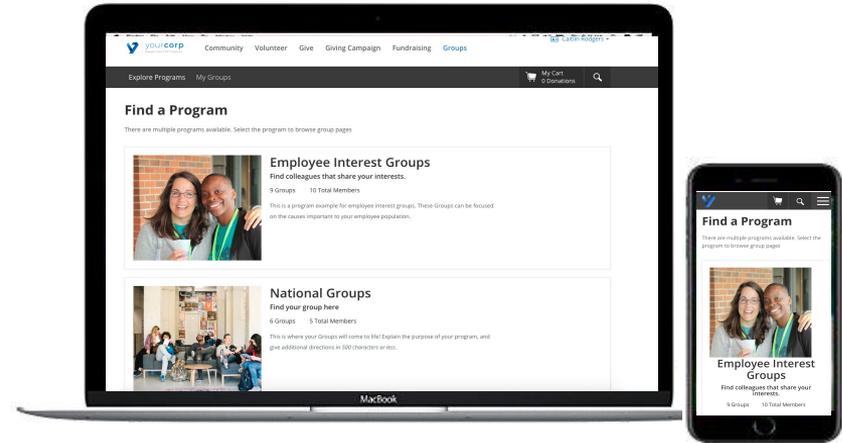
CSRconnect: Groups

Feature Guide

CSRconnect: Groups

Our Groups feature allows for collective action through volunteering and communication tools that encourage ongoing engagement in the client's community.

This document highlights the Groups feature and includes information on product configurations and requirements.



The Groups feature works like a hierarchy, providing a multi-use platform for our clients. Key elements of Groups include:



Strategize

Create multiple group programs to reach employees at the city, state or international level.



Explore

Create a tagging or filter system for a more tailored search experience.



Collaborate

Group Admins can attach volunteer events, documents, images specific to the group's purpose.



Connect

Group Admins can attach preferred charities that support the unique mission of the group and send messages about upcoming events and opportunities

Groups Program Design

Core Component Information & Requirements



Find a Program

There are multiple programs available. Select the program to browse group pages



Employee Interest Groups

Find colleagues that share your interests.

9 Groups 10 Total Members

This is a program example for employee interest groups. These Groups can be focused on the causes important to your employee population.

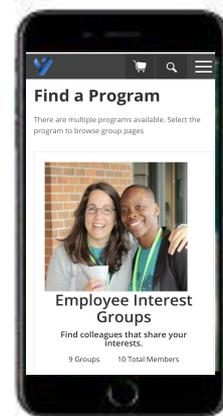


National Groups

Find your group here

6 Groups 5 Total Members

This is where your Groups will come to life! Explain the purpose of your program, and give additional directions in 500 characters or less.



**Example of a multi-program Groups landing page*

One Feature. Many Possibilities

This feature presentation covers the following details:



GROUPS SETUP

- Group Program Design
- Group Page Configurations



GROUP EXPERIENCE

- Managing a Group
- Joining a Group



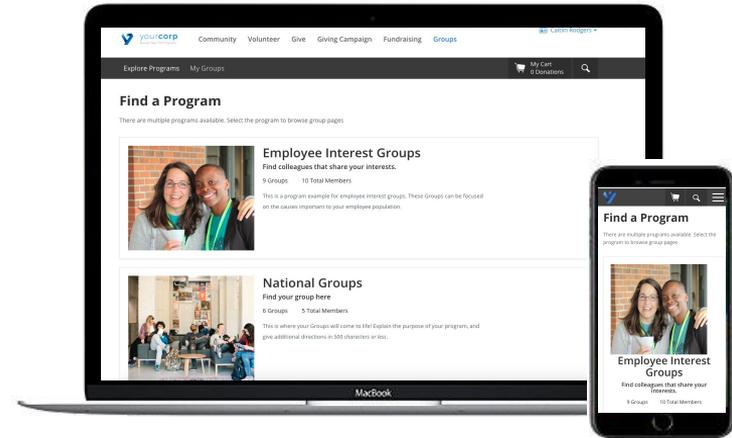
GROUP EXAMPLES

- User Experience Examples

Groups Program Core Components

Configuration Checklist:

- *Program Name
- *Program Call to Action
- *Program Summary
- *Program Image
- *Group Page Creator Setting
- *Public vs Private Setting
- Group Membership Type
- *Group Member Privacy Style
- Group Disclaimer
- Adding Group Member Options
- Tag Set
- Filters
- *Explore Groups Setup



Multiple Group Programs can be created per community. Example: National Groups + Employee Resource Groups

Program Homepage

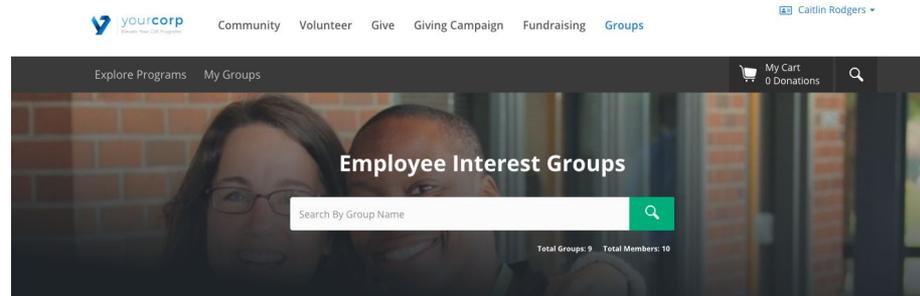
Each unique homepage gives the program its own platform. Features of the Program Homepage include:

Branding: Each group can have a unique photo, title and informational language.

Permissions: Per settings, programs can be open or closed. For example, a program can allow all users to create a group, or be limited to Admin creation only.

Search: Users can search by keyword or location.

Filters & Interest Tags: Create location filters and tags for users to narrow groups by interest vs location.



Within 50 miles of Dallas, TX [Clear Search](#)

[Create a New Group](#)

Featured Groups



Disaster Relief



Green Team

Groups Near You



Disaster Relief



Equality in Action



Women in the Workplace



Green Team



Awesome Virtual Group



Brazil

Program Branding

Program Name (1)

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

Call to Action (2)

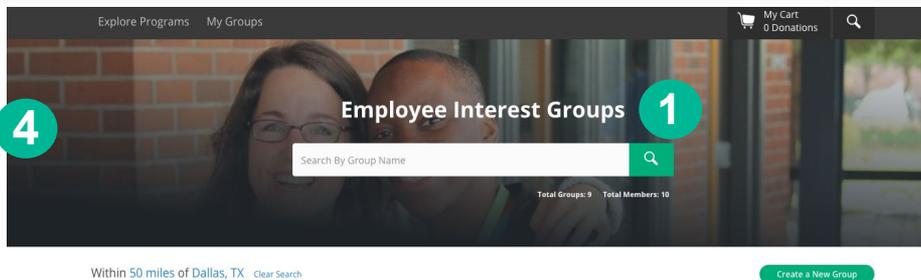
The subtitle can extend on the Group's purpose. **Required. 60 characters or less.*

Program Description (3)

Explain the purpose of your program and give additional information or directions. **Required. 500 characters or less.*

Program Image (4)

A colorful or dark image is recommended because the standard text is white. **Required. 1440 x 600 px.*



Example of program home page

Program Branding

Each Group is unique within its Program. The basic elements of a Group page include:

Title, Description & Image: The Admin can give details about the group in up to 1000 characters

Group Information: Users can view location and creation details, along with manage their group options and view Admin contact information. NOTE: Groups can have a physical location, or be set to 'virtual'.

Group Tabs: These tabs are configurable by the client and include:

- **Message Posts:** Messages are on by default, but can be limited to only Admin created messages
- **Events:** Attach volunteer events to the Group
- **Charities:** Feature charities for the Group
- **Photos:** Admins can upload photos
- **Documents:** Documents are on by default, but only Admins can attach documents

Share Group: Members and Admins can view the Group link and share with colleagues

Member Options: Once a member, employees can opt out of receiving alerts from the Group, or choose to leave the Group.

The screenshot shows a web interface for a group named "Disaster Relief". At the top, there is a navigation bar with "yourcorp" logo and links for "Community", "Volunteer", "Give", "Giving Campaign", "Fundraising", and "Groups". A user profile "Caitlin Rodgers" is visible in the top right. Below the navigation, there are links for "Explore Programs" and "My Groups", along with a shopping cart icon showing "0 Donations" and a search icon. The main content area features a group header with a photo of people in a flooded area, the group name "Disaster Relief", a "Share This Group" link, and "5 Members". A welcome message states: "Welcome to the Disaster Relief Group at YourCause. It's our job to make sure that our colleagues have great opportunities lined up to support disaster relief efforts around the world." A green "Join Group" button is present. Below the header are tabs for "Message Posts", "Events", "Organizations", "Photos", "Documents", and "Members". The "Message Posts" tab is active, showing a text input field with the placeholder "What Would You Like to Say? (max 1000 characters)" and a "Post" button. Below the input, it says "2 Posts". The first post is by "Leah Gilbert", a member since 09/05/2017 at 8:45PM, with the text: "My daughter and I went to sort donations last weekend for about 3 hours. We boxed up so many food items. It was great to eat out and lend a hand!". On the left side of the group page, there is a sidebar with "Created: 09/05/2017", "Location: Plano, TX United States", "Admin Options" (Manage Members, Edit Your Page, Delete Group), and "Administrator(s) (1)" listing "Jewell Willett" as Admin with a "Contact" link.

Configurations

These configurations determine the Group Creator experience:

Group Creation

Who can create the groups?

- Super Admins only
 - All users can create Groups
-

Explore Groups

Optional Setting to hide the Group Program from Explore Groups view.

Membership Type

Closed Groups: All groups are private and employees must request to join. Approval is handled by the Group Admin(s).

Open Groups: All groups are public. Employees can join freely.

Group Creator Choice: The Group Admin is given the opportunity to choose a public or private group.

Group Member Privacy

Private Members: When viewing the Group, you will not see a container with member information
Public Members: All Group members can be viewed on the page. Members can 'opt-out' and be viewed as 'Anonymous'

Group Disclaimer

Optional feature to show all employees a disclaimer before joining a Group.

Add Member Options

Employee Search: This allows the Admin to leverage employee search to send invitations to the group

Bulk Import: This allows the Admin to upload a list of employees and send invitations to the Group

Configurations

These configurations determine the Group Creator experience:

Group Page Tabs

Manage tabs that are available in the Groups page navigation menu:

- **Message Posts:** (Always on) Messages are on by default, but can be limited to only Admin created messages.
- **Events:** Attach volunteer events to the Group.
- **Charities:** Feature charities for the Group.
- **Photos:** Admins can upload photos.
- **Documents:** Documents are on by default, but only Admins can attach documents.

Explore Groups Setup

Groups will auto-populate within 50 miles of a users location, but the user can update their location, as well as apply filters (tags) if applicable:

- **Featured Groups:** Populate a grid of up to 15 Groups based off a set list populated by the Client.

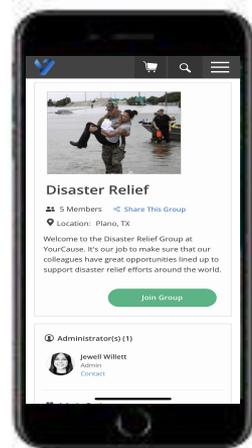
Tags & Filters

Create a tagging system to allow employees to search by location or interest area. For the best logic, create no more than three filter sets. For example: A client could create tags for each Sustainable Development Goal (SDG), and as Groups are created they can be linked to their SDG.

Groups Management

How Admins Make the Most of their Group

The screenshot shows a desktop interface for a group named "Disaster Relief". At the top, there is a navigation bar with the "yourcorp" logo and menu items: "Community", "Volunteer", "Give", "Giving Campaign", "Fundraising", and "Groups". A user profile for "Caitlin Rodgers" is visible in the top right. Below the navigation bar is a dark header with "Explore Programs", "My Groups", a shopping cart icon labeled "My Cart 0 Donations", and a search icon. The main content area features a group card for "Disaster Relief" with a photo of people in floodwaters. The card includes a "Share This Group" link, "5 Members", a welcome message, and a green "Join Group" button. To the left of the group card is a sidebar with "Admin Options" (Manage Members, Edit Your Page, Delete Group) and "Administrator(s) (1)" listing "Jewell Willett" as an Admin with a "Contact" link. Below the group card is a "Message Posts" section with a text input field, a "Post" button, and a list of posts. The first post is by Leah Gilbert, dated 09/05/2017 at 8:45PM, with the text: "My daughter and I went to sort donations last weekend for about 3 hours. We boxed up so many food items. It was great to get out and lend a hand!".



**Example of a multi-program Groups landing page*

Manage My Group

How Admins Make the Most of their Group

Once a Group is created, the Admin has a number of abilities to maintain their Group and membership:

Manage Members:

- View All Members
- View Group Admins
- Manage Group Requests
- Add Members
- Bulk Import Members
- Download a Membership Summary
- Send the Group a Message

Manage Group:

- View Group
- Edit Group
- Delete Group

yourcorp
Empowering your programs

Community Volunteer Give Giving Campaign Fundraising **Groups**

Caitlin Rodgers

Explore Programs My Groups My Cart 0 Donations

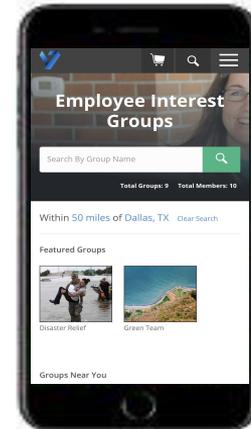
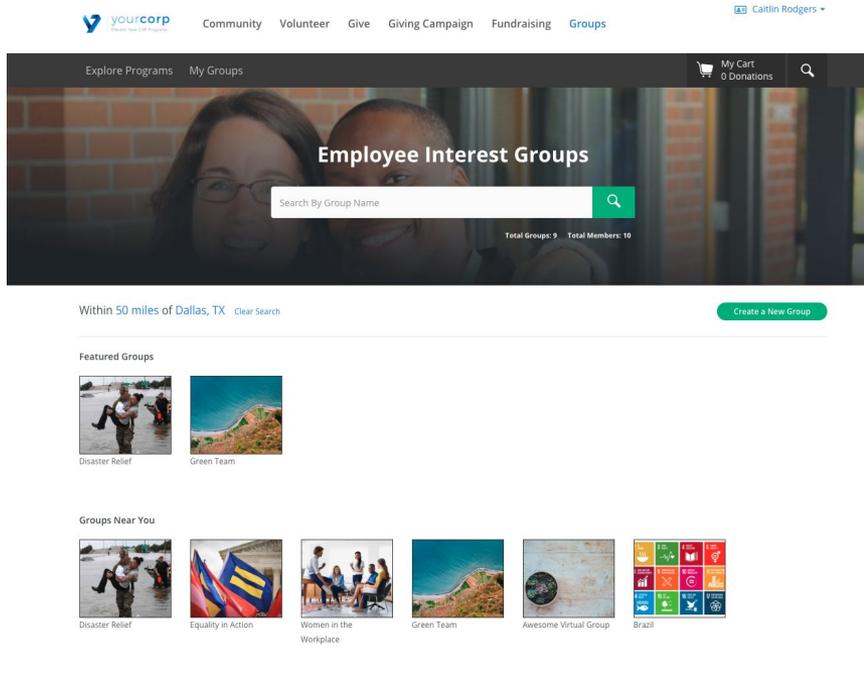
My Groups

PAGE NAME	TOTAL MEMBERS	
Disaster Relief	6	☰
Equality in Action	4	☰
Green Team	6	☰

- Edit This Page
- Manage Members
- Go to Group Page
- Send Message
- Delete Group

Groups Participation

How Employees Engage with Group Programs



**Example of a multi-program Groups landing page*

Join a Group

Once a Group is created, the Admin has a number of abilities to maintain their Group and membership:

Manage Membership:

- View Group Details
- Manage Group Alerts
- Contact Group Admin
- Leave Group

Engage with the Group:

- Add Messages to the Message Board (if applicable)
- View & Join Group Events
- View Featured Charities
- View Group Photos
- View & Download Group Documents
- Share the Group with Colleagues

The screenshot shows the 'YourCause' website interface. At the top, there is a navigation bar with 'yourcorp' logo and links for 'Community', 'Volunteer', 'Give', 'Giving Campaign', 'Fundraising', and 'Groups'. A user profile 'Caitlin Rodgers' is visible in the top right. Below the navigation is a dark bar with 'Explore Programs' and 'My Groups' on the left, and 'My Cart 0 Donations' and a search icon on the right. The main content area features a group titled 'Disaster Relief' with a photo of people in floodwaters. The group has 5 members and a 'Join Group' button. A welcome message states: 'Welcome to the Disaster Relief Group at YourCause. It's our job to make sure that our colleagues have great opportunities lined up to support disaster relief efforts around the world.' Below this is a 'Message Posts' section with a text input field and a 'Post' button. A recent post by Leah Gilbert is visible, dated 09/05/2017 at 8:45PM, with the text: 'My daughter and I went to sort donations last weekend for about 3 hours. We boxed up so many food items. It was great to get out and lend a hand!'. On the left side of the group page, there is a sidebar with details: 'Created: 09/05/2017', 'Location: Plano, TX United States', 'Admin Options' (Manage Members, Edit Your Page, Delete Group), and 'Administrator(s) (1)' listing Jewell Willett as Admin and Contact.

Groups Examples

View the User Experience throughout Groups



Find a Program

There are multiple programs available. Select the program to browse group pages



Employee Interest Groups
Find colleagues that share your interests.
9 Groups 10 Total Members
This is a program example for employee interest groups. These Groups can be focused on the causes important to your employee population.



National Groups
Find your group here
6 Groups 5 Total Members
This is where your Groups will come to life! Explain the purpose of your program, and give additional directions in 500 characters or less.



**Example of a single program Groups landing page*

Group Examples

yourcorp
Community Volunteer Give Giving Campaign Fundraising **Groups** Caitlin Rodgers

Explore Programs My Groups My Cart 0 Donations

Teens in Tech

2 Members

Supporting teen technology programs

Request to Join

Created: 01/24/2019
Location: Virtual Group
Admin Options: Manage Members, Edit Your Page, Delete Group
Administrator(s) (1): Jewell Willett (Admin, Contact)

Message Posts Events Organizations Photos Documents Members

Message Posts

What Would You Like to Say? (max 1000 characters)

0 Posts

**Example of a closed Group, requiring Admin Approval*

yourcorp
Community Volunteer Give Giving Campaign Fundraising **Groups** Caitlin Rodgers

Explore Programs My Groups My Cart 0 Donations

Disaster Relief

5 Members

Welcome to the Disaster Relief Group at YourCause. It's our job to make sure that our colleagues have great opportunities lined up to support disaster relief efforts around the world.

Join Group

Created: 09/05/2017

Message Posts Events Organizations Photos Documents Members

Message Posts

What Would You Like to Say? (max 1000 characters)

Post

Leah Gilbert
Member - 09/05/2017 at 8:45PM
My daughter and I went to sort donations last weekend for about 3 hours. We boxed up so many food items. It was great to get out and lend a hand!

**Example of an open group, free for all to join*

Join this Page

Disaster Relief

DISCLAIMER

This is the group disclaimer that each employee must agree to when joining the group.

It can include formatting and be 500 characters or less.

- I have read and agree to the statement above.
- Show my name to other users

Join Group

**Example of a Group Disclaimer*

Group Examples

The screenshot shows a group page for 'Disaster Relief' on the 'yourcorp' platform. The group has 6 members and was created on 09/05/2017. The location is Plano, TX, United States. The page features a navigation menu with tabs for Message Posts, Events, Organizations, Photos, Documents, and Members. The 'Events' tab is active, displaying one event: 'Fun Run for Kids' on June 9th. The event description includes 'Highlight as Featured' and 'Remove Event' options. A green button labeled 'View Event' is positioned at the bottom right of the event card, with the text '5 Group Members Signed Up' above it. On the left side, there are sections for 'Admin Options' (Manage Members, Edit Your Page, Delete Group, Leave Group) and 'Administrator(s) (1)' (Jewell Willett, Admin, Contact).

**Example of Events*

The screenshot shows the same 'Disaster Relief' group page, but with the 'Organizations' tab active. The page displays a list of featured organizations. The first organization is 'AMERICAN NATIONAL RED CROSS' with registration ID 53-0196605. It has options to 'Highlight as Featured' and 'Remove Organization', and a green 'View Organization' button. Below it is 'Charleston Animal Society' with registration ID 57-6021863, also with 'Highlight as Featured', 'Remove Organization', and 'View Organization' options. The page also shows '1 Group Members Donated' for the Red Cross and '0 Group Members Donated' for the Animal Society. The left sidebar contains the same group information as the previous screenshot.

**Example of Featured Organizations*

Group Examples

The screenshot shows a group page for 'Disaster Relief' with 6 members. The page includes a navigation bar with 'yourcorp' logo and links for Community, Volunteer, Give, Giving Campaign, Fundraising, and Groups. A dark bar below contains 'Explore Programs', 'My Groups', 'My Cart', and '0 Donations'. The group header features a photo of people in floodwaters, the group name, a share link, and member count. A welcome message follows. Below is a navigation menu with 'Message Posts', 'Events', 'Organizations', 'Photos', 'Documents', and 'Members'. The 'Documents' tab is active, showing a 'Directions' document with 'Download' and 'Remove' options. A sidebar on the left provides details: 'Created: 09/05/2017', 'Location: Plano, TX, United States', 'Admin Options' (Manage Members, Edit Your Page, Delete Group, Leave Group), and 'Administrator(s) (1)' (Jewell Willett, Admin, Contact).

**Example of Documents*

The screenshot shows the same 'Disaster Relief' group page, but with the 'Photos' tab selected. The group header and welcome message are identical. The navigation menu highlights 'Photos'. The 'Photos (2)' section is active, featuring a large photo of a young girl smiling next to a cardboard box labeled 'FOOD'. The box is filled with various food items, including boxes of Oreo cookies. The sidebar on the left remains the same, showing group details and the administrator Jewell Willett.

**Example of Featured Photos*

Thank You!



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