LEARNING PATH

Program Manager Essentials

For giving and volunteering programs

Welcome to your journey with Benevity!

As a new program manager, you play a key role in bringing purpose to life in your organization. This onboarding path will help you get up and running quickly so you can deliver meaningful experiences for your people and measurable results for your company.

Set yourself up for success

In just **2.5 hours**, you'll build a strong foundation with the tools, strategies, and confidence to manage and grow your giving and volunteering program using the Benevity platform.

By the end of this path, you'll be able to:

- ✔ Explain how Benevity helps you build a successful program that creates real social impact.
- ✔ Identify key features and how they support your work as a program manager.
- ✔ Complete essential admin tasks to keep your program running smoothly.
- ✔ Assess your program's performance and identify areas to improve.
- ✔ Find and support resources when you need guidance or inspiration.

How to use this workbook

- This PDF includes all recommended courses for program managers.
- Connect with your client success team for guidance on the most relevant courses based on your goals.
- Click each course title to launch and use checkboxes to track progress.

Program Manager Essentials Courses

GETTING STARTED *17 minutes*

- ☐ **Benevity's Enterprise Impact Platform** *7 minutes*
  Discover how Benevity supports purpose-driven brands and maximizes your program's impact.
- ☐ **Elevating Your Success as a Program Manager** *10 minutes*
  Explore your key goals, responsibilities, support networks, and resources to help elevate success.

BENEVITY'S GLOBAL DISBURSEMENT MODEL *33 minutes*

- ☐ **Introducing Benevity's Global Disbursement Model** *8 minutes*
  Explore how Benevity delivers funds to nonprofits across the world.
- ☐ **Benevity's Foundation Partners** *6 minutes*
  Overview of the roles, responsibilities, and unique aspects of Benevity's relationship with foundation partners.
- ☐ **Benevity's Disbursement Process** *6 minutes*
  Overview of how funds flow through Benevity and its disbursement cycle.
- ☐ **Benevity's Nonprofit Network** *8 minutes*
  Overview of how Benevity supports and maintains over two million nonprofits in its global network.
- ☐ **Fees** *5 minutes*
  Overview of the fees that are paid by nonprofits and clients.

MANAGING YOUR BENEVITY PROGRAM *31 minutes*

- ☐ **User Data** *7 minutes*
  Discover the power, process, and best practices for managing your user data.
- ☐ **Localized Experiences** *10 minutes*
  Overview of Benevity's localized experiences and how they shape the employee experience.
- ☐ **Nonprofit Eligibility** *7 minutes*
  Discover how nonprofit filters work and the benefits of an open choice approach.
- ☐ **Employee Engagement Dashboards** *7 minutes*

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Program Manager Essentials Courses

Explore how the Benevity dashboards inspire employee participation and streamline program management to drive meaningful change and impact.

GIVING *23 minutes*

- ☐ **Introducing Benevity's Donate Module** *5 minutes*
  Learn how Benevity's Donate module enables you to inspire generosity, engage employees in meaningful giving experiences, and scale your impact with advanced features and add-ons.
- ☐ **Managing Your Giving Program** *8 minutes*
  Discover how to effectively manage key areas of your program and learn best practices that create a seamless giving experience for a lasting impact.
- ☐ **Boosting Your Program with Incentives** *10 minutes*
  Explore how matching offers, seeding, and volunteer rewards serve as incentives to build a culture of generosity while aligning with business goals.

VOLUNTEERING *17 minutes*

- ☐ **Introducing Benevity's Volunteer Module** *8 minutes*
  Explore how the Volunteering Catalog can help you scale your program with vetted, high-impact opportunities that are ready to launch.
- ☐ **Managing Your Volunteering Program** *9 minutes*
  Explore how to effectively manage key areas of your program and learn best practices that create a seamless volunteering experience.

REPORTING *25 minutes*

- ☐ **Introducing Benevity Reporting Studio** *10 minutes*
  Explore the benefits of Reporting Studio, its key features, and how to use its Standard dashboards.
- ☐ **Custom Reporting in Benevity Reporting Studio** *10 minutes*
  Explore how to navigate, create, and manage custom Looks and dashboards.
- ☐ **Benevity Reporting Studio for Employee Engagement** *5 minutes*

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Program Manager Essentials Courses

Evaluate the success of your employee engagement program using standard and custom reporting.

What's Next?

Once you have built the foundation, you can explore additional courses and resources any time on the **Program Manager Training** page of the B-Hive.

Navigate to the course library:

1. Log in to your Benevity platform
2. Select **Manage** in the top navigation
3. Select **B-Hive**
4. Navigate to **Training** > **Program Manager Training**

Here you'll find additional courses on specific features. Each resource is designed to help you build new skills and take your program further.

SUGGESTED COURSES

Matching Offers for Crises and Campaigns *8minutes*
Discover how to create and manage limited-time matching offers.

Introducing Volunteering Catalog *10 minutes*
Explore how the Volunteering Catalog can help you scale your program with vetted, high-impact opportunities that are ready to launch.

Introducing Benevity Challenges *7 minutes*
Discover how Benevity Challenges engages employees in small, meaningful actions through gamified experiences and seamless integration with giving and volunteering.