



# How will we create the most inspired culture?

CULTURE PLAYBOOK



# Bonterra

The foundation of all good works.

A combination of the French "**bon**" (or **good**) and Latin word "**terra**" (or **land**), Bonterra represents the exponential good that can be accomplished with the right footing or foundation.



# We power those who power social impact.

## Why does Bonterra exist?

The answer is our purpose: to power those who power social impact. We create and deliver the tools our clients need to achieve their goals. But to do that to the best of our ability requires that we support one another on the inside of the company as passionately as we support our customers on the outside.

**Building the most inspired culture** is an essential part of our Impact Agenda and living our values is an important component of How We Thrive.

## Where does an inspired culture come from?

What will it take? It starts with shared expectations about what matters to us. That's why our core values are so important—they are the guides helping us focus on what is most important in how we do our work and how we do that work together.

**By committing to our values**, we will be able to deliver on our purpose with more power, competence, and appreciation along the way.

**That's why striving to create the most inspired culture** is on par with our other business goals and why it isn't just something you experience. It's something you create. Something we'll grow together.

# What's in this culture playbook?

- An invitation to play(book)
- Six Components of Company Culture
- Our Purpose and Persona
- Our values
- Values Stories
- Exercises and Prompts

# An Invitation to Play(book)

We're excited for you to learn about our culture and all the pieces that help us chart our course. Our goal is to give you a foundation, a place to start getting to know and playing with the elements of Bonterra's culture.

Our four values were co-created by a team of cultural ambassadors from across Bonterra—it's no surprise that this diverse group of people came up with a value that's designed to **Cultivate Inclusivity**. We put our stake in the ground for this as a core value for Bonterra because it is necessary as a throughline of how we work and relate to each other.

Our value, Elevate Doers of Good, reflects the soul of who we are, why we're here, and what we do. Our Optimistic Advocate brand persona is threaded throughout our experience as

Bonterrans, where we're always striving to lift our clients while doing the best work of our lives.

We invite you to get curious, be inspired, and keep on learning forward. It's how we live our **Innovate Courageously** value: we continue to grow as individuals, teams, leaders, and an organization.

The Bonterra Culture Playbook is also a place to reflect. A place to think and a place to express yourself. A place to **Appreciate the Journey**. From before you step inside the organization, all the way through your career as a part of Bonterra, appreciating the journey keeps us grounded and connected as we do this big work.

**We can't wait to see how you use the playbook.  
We're all culture ambassadors now.**

**Your journey begins here. Ready?**

# The 6 Components of Company Culture

The Components of Company Culture is a six-part framework. It is a process that builds on its own momentum to become a self-reinforcing system. The first three components are about creating the vision for the culture, while the second three are about bringing the culture to life. Together all six create a system for taking an active role in the outcome of how people feel and are engaged in the organization.



## PURPOSE

Why an organization exists beyond making money.



## VALUES

Shared beliefs about what is most important when conducting business.



## BEHAVIORS

Choices made by employees that are guided by purpose and values.



## RECOGNITION

Actions that encourage behaviors that bring culture to life.



## RITUALS

Recurring group activities that build and strengthen relationships.



## CUES

Reminders that help employees and leaders stay connected to the future.

## OUR PURPOSE

We <sup>1</sup> power <sup>2</sup> those  
who power  
social impact. <sup>3</sup>

1

Our brand persona is the Optimistic Advocate. We balance boldness with warmth, bringing confidence and conviction while always remaining approachable.

2

We enable and elevate the hardworking people behind social good organizations by supporting them with best-in-class tools and technology.

3

We are raising the bar for how the work of social good gets done. With our customers, we are maximizing the impact that the doers can make.

# OUR COMPANY VALUES

## COMPANY VALUES ARE DISTINCT FROM PERSONAL VALUES

### PERSONAL VALUES

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Words, phrases, and symbols that represent one shared beliefs about what is most important when conducting business. They guide the choices that individuals make within an organization as they strive to achieve a set of *shared goals*.

### COMPANY VALUES

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Words, phrases, and symbols that represent one individual's beliefs about what is most important when conducting one's life. They guide the choices that the individual makes as they strive to achieve their *personal goals*.

You can hold a belief about a choice as an individual and in a company context, you're not going to make a business decision or a judgment call on a colleague based on personal values. Through our shared Bonterra values, we intend to develop and practice deeper understanding of ourselves, to unlock our strengths, and engage in the complexity that is always present. This is why Cultivating Inclusivity is one of our core company values.

# As Bonterra emerges as an organization and a brand,

our four company values will support and direct us today and as we face emerging challenges along our journey.

- Guide the behaviors of leaders and staff
- Reinforce the culture we want to create at Bonterra
- Support organizational goals
- Form how we assess performance

*Our company values are distinct from our Acceptable Use Policy. While values guide our behaviors and support our goals, they don't determine who we work with or inform decisions related to policy and contracts.*

## COMPANY VALUES



**Bonterra's values** are interwoven into a ribbon. While each value has its own distinct role and meaning, they are woven together to symbolize the intersectionality of our diverse identities. Our company values are strongest in relationship with each other, just like we are. The values ribbon represents our connection.

# Our values are designed to inspire and to be applied in your day-to-day at Bonterra.

Each value is presented with associated action statements\*. When you need a decision-making tool, look to how to apply them as individuals, teams, and leaders. There is guidance in the pro tips, stories, and exercises to help you get into your role as a Bonterran Culture Ambassador.

\*HOW THESE ARE PRESENTED

Each value is presented on a single page, defined by actions and meaning.

**What we mean** - gets into and underneath the value

**what we do** - statements that support aligned behaviors

**what we don't do** - statements that show behaviors that are not aligned

**what we ask** - questions to help us live our values

# Elevate Doers of Good

Fuel growth. Power with partnership. Do the best work of our lives.

## WHAT WE MEAN

We flex our personal heart, tech smarts, and collective muscles to see the possibilities for social good and business growth. As the optimistic advocates behind the scenes, we're always looking for ways to elevate our clients—the doers of good—so more good can be done. It takes focus and extreme collaboration to power our clients. And we're immensely proud to play our part while doing the best work of our lives.

## WHAT WE DO

- Raise the bar for how the work of social good gets done
- Make and deliver accessible, efficient, and effective tech that fuels impact
- Amplify the ways in which we collaborate
- Prioritize purpose and profit
- Understand our role as enablers of our clients

## WHAT WE DON'T DO

- Lose sight of our purpose
- Forget we're a for-profit tech company

## WHAT WE ASK

- How will I make a difference today for my partners and clients?
- Am I supporting my words with action?
- What does my best work look like?

# Elevating is what we do. It's our heart and soul.

- Fuel growth
- Power with partnership
- Do the best work of our lives

Elevate Doers of Good comes first—it is at the center of who we are. We prioritize purpose and profit to fuel our company's growth.

**Individual:** Whether I work directly with our clients or play a role behind the scenes, I play an important role in helping our clients do even more good work.

How can I do the best work of my life here at Bonterra?

**Team:** Spotlighting our client stories is a very visible, tangible, and inspiring way we elevate the doers of good. We power with partnership behind the scenes and give a team member a chance to shine the light of that story.

**Leader:** We are here to optimistically advocate for the doers of good and each other. To remind our people of why we're here. And to remind ourselves that if there's a question of which direction to go in, we direct towards elevating doers of good.

# Cultivate Inclusivity

Open doors. Create space. Center diversity, equity, inclusion, and belonging.

## WHAT WE MEAN

To be inclusive, each of us needs to be an attentive ally. No matter our position, identities, or background, we own our part in making a working environment in which the multiple dimensions of diversity are embraced—thought, neuro, work and lived experience, ability, gender, sexual orientation, race, and beyond. We are passionate and diligent about cultivating a culture where everyone can thrive.

## WHAT WE DO

- Discover, unlock, and develop strengths
- Communicate with honesty, clarity, and kindness
- Exercise mentorship, not just management
- Establish spaces of belonging
- Assume positive intent
- Treat each other with dignity and respect
- Hear what isn't being said

## WHAT WE DON'T DO

- Assume we know what it's like to be someone else
- Tolerate negative behaviors and harmful choices
- Wait for others to step up

## WHAT WE ASK

- Who else can I invite in?
- Can I communicate this in a clearer, kinder way?
- What's your perspective?

# What do we mean by diversity?

What do we mean by *diversity*?

Diversity has many layers and includes all the ways in which people differ, encompassing the different characteristics that make one individual or group different from another.

Diversity is about the multiple dimensions of identity that form a unique intersectional tapestry of perspectives. This intersection of perspectives comes about from our own characteristics of diversity.

A grounding element of diversity is that it's a combination and an intersection of our unique and different elements and experiences.

To be- and to cultivate a culture of inclusivity means to cultivate a deep curiosity for others' diverse perspectives derived from multiple dimensions and experiences.

The tapestry of inclusivity at its core is about the diversity that makes us a stronger whole and our willingness to strengthen a resilient courage that leads with curiosity, aims to keep unlocking strengths and connectivity, and an optimism to strive to learn more.



# We are consciously cultivating inclusivity.

- Open doors
- Create space
- Center diversity, equity, inclusion, and belonging

Cultivating inclusivity is a conscious choice. And centering diversity, equity, inclusion, and belonging (DEIB) requires a company-wide effort. We are each accountable for participating in creating an inclusive culture.

**Individual:** We get curious and brave: asking and inviting the perspectives of people whose lived experiences are different from ours. What does it mean to think about how we act? We listen beyond what is obvious and look beneath the surface. We communicate with honesty and transparency, treating each other with dignity and respect. And we balance our ways of taking up and making space.

**Team:** We are here to notice and bring out the best in one another. How can our team be an example of the multitudes of diversity that make the fabric of Bonterra stronger? Where is my team being dominated by certain voices? How can we balance and strengthen?

**Leader:** How do we help everyone feel like they can thrive and participate? Especially as leaders, we can't rest on "Assume positive intent." We model awareness of how our words and actions impact people. We step up, speak up, and learn what is needed to build, restore, and move forward with compassion and empathy.

# Innovate Courageously

Be curious. Deeply understand our clients. Have each other's backs.

## WHAT WE MEAN

Inventing what doesn't exist requires a curious mind and a growth mindset. We keep the clients we love at the core of what we do, seeking the knowledge and understanding that will solve for unimagined possibilities and unmet needs. It takes encouragement and safe spaces to experiment without fear. We celebrate hard work, develop trust, model accountability, and learn continuously—this is how we win, together.

## WHAT WE DO

- Encourage people to be courageous
- Voice clear expectations and priorities
- Share new ideas, give feedback, speak up
- Favor progress over perfection
- Foster ownership and accountability
- Share stories of resilience
- Develop deep client empathy
- Lead with curiosity

## WHAT WE DON'T DO

- Innovate for innovation's sake
- Assume we know all the answers
- Hold back out of fear of being wrong

## WHAT WE ASK

- What do my clients and partners really need?
- How do I get comfortable with discomfort?
- What did we learn, and what will we do next?

# Courage and curiosity fuel our innovation.

- Be curious
- Deeply understand our clients
- Have each other's backs

If Elevation is our heart and soul, Innovation is our engine fueled by curiosity. We get deeply curious about our clients to understand their unique challenges and generate new ideas to meet those needs and the next ones. All Bonterrans have the ability and the opportunity to innovate courageously.

**Individual:** When every one of us owns the work we do every day, what we can achieve is limitless. When I lead with curiosity and favor progress over perfection, I'm able to let go and try new things. That kind of bravery has a positive impact on everyone around me.

**Team:** Let's talk openly, kindly, and optimistically about all those twists and turns that are part of our learning. What if we started each project or phase with stories of resilience? We can achieve a higher and deeper understanding of our clients' needs and wants with a collective growth mindset?

**Leader:** We model and give our teams a combination of clear expectations, trust, and autonomy. What can I do to make sure people feel a sense of genuine support to try things out and develop a true sense of ownership?

# Appreciate the Journey

Celebrate progress. Bring everyone along. Enjoy the ride.

## WHAT WE MEAN

We are passionate people driven by an urgent purpose—sometimes that kind of responsibility can be a lot to carry. It's why we remember to meet the days with optimism and meet each other with warmth, humor, and openness. We understand that taking our work seriously doesn't mean we have to take ourselves seriously. And we are grateful we have this opportunity to take part in the mission of Bonterra.

## WHAT WE DO

- Meet people where they are
- Never leave anyone behind
- Stay grounded while we break new ground
- Show up with optimism
- Invite humor into the room

## WHAT WE DON'T DO

- Move forward without establishing trust
- Run on empty
- Forget the long view

## WHAT WE ASK

- Who, what, or how did I appreciate today?
- What's energizing me this week?
- How can I stay grounded?

# Appreciating the journey starts where you are.

- Celebrate progress
- Bring everyone along
- Enjoy the ride

Appreciating the Journey is the value that grounds us and gives us perspective, both day to day and keeping our eyes on the long view. It reminds us to be human, to smile, and to hold each other with grace.

**Individual:** Appreciating the Journey takes self-awareness and self-care. Remember to pause in the moment, recalibrate, and step away. Refilling our cup is what we do for ourselves to set the tone and create room for other folks to do it, too.

**Team:** As we seek to do our best as a team, appreciation can take us through the descents and help us celebrate

when we get to the next crest. And laugh out loud—lots of laughing out loud.

**Leader:** We “meet people where they are” to honor how we show up day to day. We appreciate that presenting our work lives as perfect, untroubled, or easy isn’t real, realistic, or joyful. So we don’t ask people to check their humanness at the door. We invite folks to bring all of themselves, setting the tone with how we appreciate.

# CULTURE STORIES

# Elevate Doers of Good

Fuel growth | Power with partnership | Do the best work of our lives.

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We debated quite a bit on which value we wanted to start with. And this was the natural one, the one that says elevating our clients, the doers of good. When we all started meeting many months ago, we immediately wanted to make sure that we were all representing the clients that we had worked with so closely over the years. We all came together and had really, really strong opinions about making sure we have all of our clients at the forefront.

— *Culture Ambassador*

I know that every time we've done the right things for our customers good things have happened and when we haven't it hasn't worked out so well. So for me that's that's the really, really important part of this.

And it's so easy to do the right things for our customer, because these are fantastic people. they're supporting not for profits with their financial resources or they're working as part of nonprofits to make the world a better place, so this is the easiest thing in the world do.

— *Executive Leadership Team Member*



# Cultivate Inclusivity

Open doors | Create space | Center diversity, equity, inclusion, and belonging

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Bonterra consists of major social good platforms comprised of a community of people who care deeply about our work, our clients, and one another working together on the daily. A lot of tough conversations will be had. It's important when you're sharing your perspective to think "how can I communicate this in a clear, kind way so that whoever is receiving my feedback understands where I'm coming from and everyone has a good, constructive conversation?"

Just as all the platforms have their respective strengths and weaknesses, so do we as people. And it's important that we celebrate, recognize, educate, and appreciate each other's diversity within and as we represent Bonterra.

— *Culture Ambassador*

We consciously created a diverse team of 18 ambassadors from across the organization. The folks who brought their own passions and thinking to countless working sessions were the key to understanding how important treating each other with dignity and respect in everything we do. When moments of difficulty came up, we talked them out and made sure everyone was heard, even when it meant taking a pause and stepping back. Our values are stronger for it and so are we.

— *Executive Leadership Team Member*



# Innovate Courageously

Be curious | Deeply understand our clients | Have each other's backs

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Think about a time when you went out there and then decided to shoot your shot, really going for something that you feel is maybe just out of reach. For me it was putting my name in the hat for an implementation manager job many years ago with someone who thankfully continues to be my current boss. How much easier is it to go after your dreams when you have a team behind you cheering you on?

— *Culture Ambassador*

Innovation doesn't need to be this groundbreaking, sky parting moment, it can be iterative improvements or new perspectives that add up and make a gigantic difference.

And if you identify a problem, you don't need to have a solution in mind. Team up, find people that have different experiences, backgrounds, and skill sets. When you identify and structure a problem, you don't have to do it all yourself.

Take a shot and team up. That's how we innovate courageously, together.

— *Executive Leadership Team Member*



# Appreciate the Journey

Celebrate progress | Bring everyone along | Enjoy the ride

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When you read where we landed, it can sound like we were all getting along with high fives and having a great time. But we truly did dig into what is really important to folks. We talked about things like compensation discrepancies, broken promises for progress, and even what clients we shouldn't support. Nobody held back on why we were passionate about our perspectives and ultimately we walked away with a better understanding of where each of us was coming from with mutual respect and a lot of genuine care for one another. Appreciating the journey isn't about being nice instead of being honest, it's about doing the work to stay truly connected, so that we can really share in this awesome mission that we get to put together, together.

— *Culture Ambassador*

To me this value is really the result of the other three in action day to day. I love how it comes to life. In practice, we are a team, including clients, first. We are relentlessly optimistic. We sprint with all that we have and we also take rest very seriously. And we bring the whole team along with this journey. When I think about how I'm going to personally apply this, it's really to remember to appreciate someone out loud every single day, to assume positive intent, to set goals and hold myself accountable to them. To make sure that I'm staying grounded, to always remember the bigger picture of the company, and to make sure that I have fun along the way, by appreciating what I learned.

— *Executive Leadership Team Member*



# EXERCISES AND PROMPTS

01

# Values quick-start

Learn what the Bonterra values mean to you.

# Values quick-start

Learn what the Bonterra values mean to you.

01.



# Exercise 1b: **What's a story that you could share to illustrate each value?**

**Pro tips:** Avoid jargon, keep it real, make it about your own experiences.

Elevate Doers of Good

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Cultivate Inclusivity

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Appreciate the Journey

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02

# Values activation

How will you put our values into practice?

# Values activation

How will you put our values into practice?

02.



# Exercise 2b: **What is a moment we can celebrate that embodies each value?**

Elevate Doers of Good

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Innovate Courageously

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03

# Values integration

What might success look like?

# Values integration

What might success look like?

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## Exercise 3: **Culture clues and cues**

**I know that our culture is moving in the right direction when someone says/does**

use this as a place to jot down experiences, stories, and behaviors you participate in, witness, and want to encourage

**Pro tips:** This is a great place to make a new connection with a Bonterran or deepen a current one. Sharing perspectives with each other on our culture in real life is another way to Cultivate Inclusivity. It's all connected on this journey.



# CULTURE PROMPTS

# Try this today: **Openings to set the tone**

**Pro tips:** Start your own list. Make notes on which ones work best, keep experimenting. Work with your team to build these together.

Staying grounded and showing up with optimism might mean we start with an opening question to set the tone and feel the mood when we meet.

Everyone is always eager to make the most of our time and get started on the work of the moment. We get it. We've all got work to do.

Opening questions don't have to be deep (though they can be). We just take 5 or 10 minutes at the start for each of us to share before we jump in:

- **What's your favorite breakfast food?** (sure to start a discussion on the best breakfast tacos in Texas or the best egg sandwiches in the Northeast)
- **What are you grateful for right now?**
- **What's an emoji that depicts how you're feeling right now?**  
Drop it in the chat: 😊 You get the picture.

You can even come up with the opening on the spot, build it into the agenda, or rotate the check-in question facilitator person.

In practice, arriving together helps us get to know each other, and creates a positive and connective vibe. And getting to know each other helps us build trust. Which helps us keep moving forward on our journey together so that we don't leave anyone behind.

# Try this today: **Cultivate inclusivity at meetings**

**Pro tips:** What behaviors do you see in meetings that you can adjust or look out for?

Meetings are an area where we can all have an impact, so a few ideas of how we can foster inclusion or an environment of inclusion where contributions from everyone are encouraged:

- 1. Seek out input and contribution from your peers who might be less likely to speak up.** We have a lot of introverts here. Watch for facial cues to see those who might tend to be quieter when they actually have something to contribute call on them and give them an opportunity to add something to the conversation.
- 2. Send out meeting materials in advance and share questions in advance to be discussed this is helpful for our teammates were English might be a second language.** Or even for introverted employees who function better when they are given time to process information before reacting to it.
- 3. Give credit where it's due.** When someone is recognized for an idea that someone else put forward earlier in the meeting, point out who shared the idea originally.
- 4. Be conscious of your communication style.** Don't assume you know more than others by explaining concepts they may already understand. Don't over explain. Don't mansplain.
- 5. Promote active debate and be polite if someone interrupts.** Call attention and underscore the importance of letting everyone be heard.
- 6. As the offices start to open back up more broadly in the next few months, consider the experiences for team members.** Regardless of if they are in an office or they work remote, make sure that both have equal opportunity to be part of any conversation.

# Try this today: **Appreciation Practice**

What you appreciate appreciates. It's a practice to build. Use these questions to reflect and make your own space to appreciate (it starts with each of us and radiates out).

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**Who** did I appreciate today/this week/this quarter?

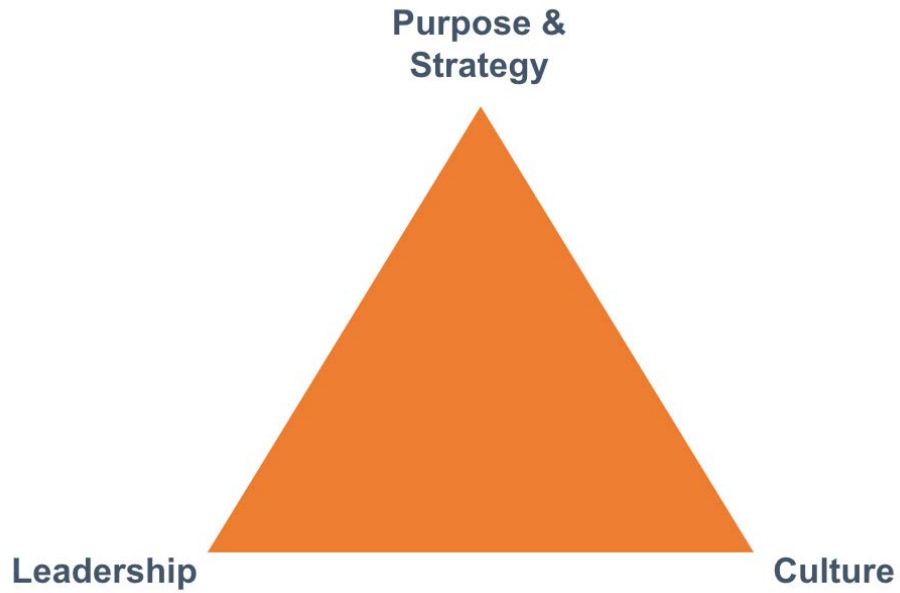
**What** did I appreciate today/this week/this quarter?

**How** did I appreciate today/this week/this quarter?

# This is a beginning not an end.

We are committed to fostering open communication and helping each other explore and experiment with living our **Bonterra values in action**. We won't shy away from engaging in tough conversations. It is our hope that when we practice and live our company values that our foundation of good works will continue to grow and sow positivity inside Bonterra, for our clients, and the communities we serve.



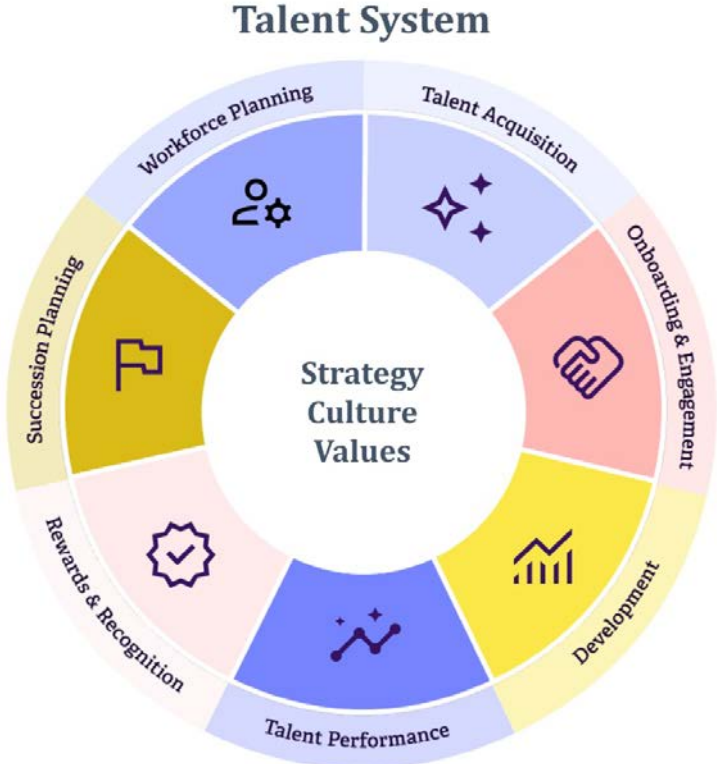
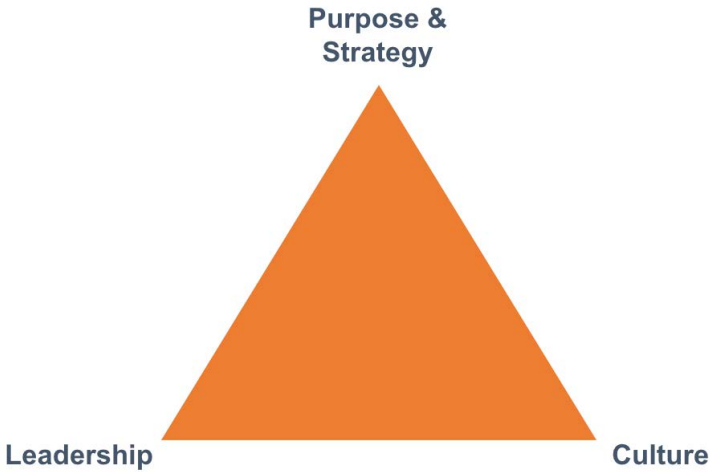


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## Moments That Matter



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### Moments That Matter

