



Every company and campaign is different, and the Big River program is flexible and customizable to meet the needs of your individual company. This document is a tool to assist you in developing and running a successful campaign. You will be asked a series of questions regarding your workplace campaign that will be used to build a company-specific website for your organization. Answering the questions below will help you; your team and United Way of Greater Cleveland determine your specific needs. If you have any questions, please contact your Workplace campaign coordinator.

Company Name:

PRIMARY CAMPAIGN CONTACT(S) INFORMATION

Please provide contact information for all team members working on the campaign. The Additional Employee Campaign Manager is who we should contact if you are unavailable. The IT Staff Contact is who we should work with for any IT related specifics such as whitelisting and SSO setup. The Payroll Staff Contact is the person we will send the payroll file to after the campaign is completed.

Employee Campaign Manager

Name:
Phone:
Fax:
E-mail:

IT Staff Contact

Name:
Phone:
Fax:
E-mail:

Additional Employee Campaign Manger

Name:
Phone:
Fax:
E-mail:

Payroll Staff Contact

Name:
Phone:
Fax:
E-mail:

CAMPAIGN SETTINGS

The following information is required to create your campaign on Big River.

Launch Date:

Close Date:

United Way of Greater Cleveland will send your payroll file after the close of your campaign.

Payroll File Due Date:

Payroll File Special Instructions:

Total number of Employees:

Will any of your employees use paper pledge cards?

☐ **Yes** ☐ **No**

Do you have locations outside of Cuyahoga County that will be included in this campaign?

☐ **Yes** ☐ **No**

If Yes, please list all to be included:

.....
.....

**United Way of Greater Cleveland will remit all funds to all local United Ways and designated agencies for all of your locations.
Are you able to remit payroll funds to United Way of Greater Cleveland with a breakdown by employee or by facility?**

☐ **Yes** ☐ **No**

Do you plan to solicit retirees through this campaign?

☐ **Yes** ☐ **No**

Online giving campaigns offer multiple options for a donor to donate. Please check the options you would like to offer your employees:

Payroll Deduction: *(one-time)*

☐ **Yes** ☐ **No**

Payroll Deduction: *(per pay period)*

☐ **Yes** ☐ **No**

ACH: *(one-time, quarterly or monthly)*

☐ **Yes** ☐ **No**

Cash: *(one-time)*

☐ **Yes** ☐ **No**

Check: *(one-time)*

☐ **Yes** ☐ **No**

Credit Card: *(one-time, quarterly or monthly)*

☐ **Yes** ☐ **No**

Stock:

☐ Yes ☐ No

Direct Bill*:

☐ Yes ☐ No

No Donation: (default)

☐ Yes ☐ No

*With direct bill, a donor will receive invoices from United Way for their pledge on a periodic basis, sent to an address specified by the donor.

If you have selected Cash/Check as an option, you must provide a specific contact responsible for collecting paid in full gifts within the company:

Contact Responsible for Collecting:

Cash/Check:

Name:

Phone:

E-Mail:

Checks will be forwarded to United Way of Greater Cleveland:

☐ Weekly ☐ Bi-Weekly

(Please, no later than one week after the close of your campaign)

Please specify all of the pay periods that your employees have for payroll deduction:

☐ 12 Pay Periods ☐ 24 Pay Periods ☐ 26 Pay Periods ☐ 52 Pay Periods

☐ Other:

Any payroll deduction cancellations, before as well as after the site has been closed, should be forwarded immediately to your contact at United Way to ensure accurate reporting for campaign totals. If the campaign is closed, please also notify your payroll contact at your company to cancel the deductions.

BIG RIVER IT WHITELIST ITEMS AND BROWSER REQUIREMENTS

Big River is supported on the most current versions of:

- Internet Explorer (IE11 or IE12): Download the latest version - **Big River is unable to support Internet Explorer 10 after Microsoft ended lifecycle support of IE10 on January 14th, 2020. If your company uses IE10 as the default browser, you will need to open a different browser to access your campaign site.**
- Mozilla Firefox: Download the latest version
- Google Chrome: Download the latest version
- Safari: Download the latest version

Per new PCI Data Security Standard compliance guidelines, older versions of Internet Explorer will no longer be able to access the Big River website as of June 30th, 2018 due to the TLS 1.0 data security transfer protocol no longer being supported. To meet these PCI compliance guidelines your browser must run on TLS 1.1 or higher. Most browsers update the TLS automatically; however, Internet Explorer does not and if no adjustment is made then any person attempting to reach the site will be redirected to an error page explaining the disabled protocol.

Will your IT department be able to meet the browser standards above?

☐ Yes ☐ No

Please also ensure your IT department whitelists the following:

- Domains
- gobigriver.com
- give.unitedwaycleveland.org

Will your IT department be able to whitelist the above addresses?

☐ Yes ☐ No

United Way of Greater Cleveland offers the ability to utilize Single Sign-On for your campaign.

Benefits include:

- No need for login information to be provided to employees.
- Clicking the link will automatically log the employee into the site with immediate access to the pledge form.
- No time spent by you or any United Way staff helping any employees with forgotten passwords.

Some companies may be required to utilize Single Sign-On (SSO) should they meet the following requirements.

Requirements:

- You have multiple locations outside of Cuyahoga and/or Geauga county.
- You have a person at each location who will need admin access for reporting.

EMAIL COMMUNICATIONS

The Big River system allows for flexible communications when a donor’s e-mail address is supplied. Kick-off information, reminders and confirmation e-mails can be sent automatically. Reminders will be sent only to employees who have not participated at the time of the e-mail.

Would you like UW to send system generated e-mails for your campaign?

☐ Yes ☐ No

If using e-mail, will you be sending reminders during your campaign?

☐ Yes ☐ No

If yes, when would you like them to be sent?

☐ Weekly ☐ Bi-Weekly ☐ Halfway ☐ Near End of Campaign

☐ Other:

Preferred window time frame for emails to be sent: (ex: Between 9:00 am - 11:00 am)

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If using e-mail, what 'Reply To' e-mail address do you want to use? *(This e-mail address will receive e-mails if an employee chooses to reply to their kick-off e-mail invitation, either to ask a question or voice an opinion)*

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The website can be personalized to the individual donor with a greeting at the top and additional information such as a specific ask amount, their last year's pledge, a team captain's name and phone number or any other information that you may provide. Please let us know what information you would like to display to the donor below:

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.....

.....

After a person pledges, the system will display a Thank You message and a confirmation and Thank you e-mail. This message can be created by you or we can supply a generic Thank You. Please let us know which you would like to use.

Will you be creating your own thank you message?

☐ **Yes** ☐ **No**

Once your campaign has been closed, a message will be displayed directing the employee to contact a specific person at your company for a paper pledge form to fill out. Those forms should be forwarded to your United Way of Greater Cleveland contact person.

Contact Responsible for Paper Pledge Forms:

Name:

Phone:

E-Mail:

Person responsible for inputting paper pledge forms received prior to site close date:

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BIG RIVER ADMINISTRATION

☐ **How many people in your organization will need to run reports from the system?:**

Will you be assigning your employees to team captains?

☐ **Yes** ☐ **No**

EXCEPTIONS

Are there any special circumstances that we should be aware of in the processing of your campaign results? If so, please indicate:

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REPORTS AND EXPORTS

One of the most important elements of managing your campaign is being able to get useful and timely reporting. The Big River system includes robust reporting and exporting tools that are available to you. However, in order to get the most useful reporting, we need to understand your reporting needs. For example, companies often want to be able to group their employee results in some of the following ways.

Company organization structure:

- Location
- Division
- Department/Cost Center

Employee groups:

- Management / Non-management
- Job Level Hourly / Salary
- Targeted giving levels, including Leadership donors
- By manager or team leader

Groupings can also be used to facilitate other features in Big River:

- Email communication to specific groups
- Developing different “ask” strategies for various employee groups
- Previous Donor / New Donor groups Different “messaging” to groups
- Kickoff for groups

Reports can be downloaded as a text, PDF or Excel file. In addition to reports, you will also have the ability to download your campaign data into Excel and other formats at any time. This will allow you to develop your own reports and do more complex analysis of your campaign data that is not available within the Big River system. We will provide you with the most commonly requested reports on your site. You will simply have to generate the report. Please let us know how you would like to segment your donors for reporting purposes:

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CHECK LIST OF THINGS YOU NEED TO PROVIDE TO BUILD YOUR BIG RIVER SITE:

ITEM	OPTIONAL OR MANDATORY	DATE NEEDED
Copy of this planning document	Mandatory	6 weeks before launch
Login Blurb Message (MS Word file)	Mandatory	4 weeks before launch
Informational Links	Optional	4 weeks before launch
Welcome Image (in jpeg format)	Optional	4 weeks before launch
Company logo (in jpeg format)	Mandatory	4 weeks before launch
Pictures/multimedia (in jpeg or Flash file)	Optional	4 weeks before launch
Employee information*	Mandatory	4 weeks before launch
Goal amounts	Optional	4 weeks before launch
Thank you message (in MS Word file)	Optional	4 weeks before launch
E-mail messages (Kick-off and reminder in MS Word file)	Optional	1 week before launch

*Please review the Employee File Layout. Your help in providing employee data to the specifications listed greatly facilitates our processing campaign results.

Failure to provide any of the above items in the time frame specified may result in a delay in launching the Big River site.