Giving Event Requirements

Basic

Giving Events

These requirements detail site functionality changes for Match Events. It defines changes in the sites normal functionality and appearance to support three types of Match Events:

- **Global Match Giving Event** (e.g., Big Give)—for Nonprofit Portrait and Directory Listings Only

The impact of each of these events on the functionality of specific site components is contained in Figure 1. The matrix is for template default settings, all parameters will be configurable as otherwise stated.

Match events shall have five modes (phases). The specific changes to the site are contained in the matrix:

1. **Pre-Activation:** This per-event mode is primarily a marketing phase. The site behavior is not changed.
2. **Pre-Run Activation:** This Pre-Event mode is still geared towards marketing, but adds more urgency (countdown timers to the event, different information on the Event Landing Page)
3. **Run:** This mode is the match event, which is the mode which has the greatest impact on the site.
4. **Post-Run Activation:** Similar to the Pre-Run Activation in functionality and impact to the site. The content is changed to message the results.
5. **Post-Activation (Normal Operations):** This is the site's normal mode of operation.

1.1 **Pre-Activation shall be a manual function done under normal operating procedures. The staff shall have the ability to automate all other modes based on specifying date and time.**

1.2 **The staff shall have the ability to configure the Run mode by setting the start and stop time.** The Post-Run Activation mode shall be configured to be in effect automatically when the Run mode is ended. Marathon is pro-ratio and based on the time of the event.

1.3 **The staff shall have the ability to manually activate or deactivate any mode**

1.4 **The staff shall have the ability to configure and turn on/off a global banner (e.g., text alerts, countdown timers, etc.).** The banner will shall be designed so that it can be turned off manually, by a timer, or at a pre-designated time.

1.5 **Once an event has started, eligibility of participating organizations cannot change**

1.6 Nonprofit Portrait and Directory Listings are the only entities eligible to receive donations. All other recipient funds, projects, and organizations are unable to receive donations.

1.7 **The staff shall have the ability to enter bonus pool amount**

1.8 **The staff shall have the ability to enter bonus pool amount and separate amounts for different counties or program areas based on nonprofit location**

1.9 **Donations to all entities are allowed during Pre-Activation and Post-Activation**

1.10 **Ability to set the credit card fee percent and require or not require ACH for nonprofits for giving day or normal operation (portals and directory listings)**

1.11 **Do not allow recurring gifts during any type of giving day (Please note this on the administrative set up screen as a reminder to staff)**

1.12 **Staff need ability to generate a special promo on email receipt**

Giving Events

1.12.1 **Email promo image will be managed in CMS**

1.13 Each event shall have a unique landing page which may be archived

1.14 Will need unique, readable / vanity / user-friendly link for each portrait, including listings, and event landing pages for promotion and sharing purposes

1.15 Disabled functionality for events shall be done so in a manner which is user friendly (e.g., disabling a button without any user cue is not user-friendly, while removing the option all together would be)

1.16 Cart, confirmation and receipt and NPO transaction details screens will have special messaging for each event mode—Pre, Run, and Post phases

1.17 If credit card fee is set to zero, hide the check-box for covering fee

1.18 Category landing pages will only pay attention to the filtered results set for a giving day dataset (while still honoring picker sort order)

1.19 For social sharing, if a user is on a mobile device (phone, tablet), we would like to prompt the native app to open instead of the mobile web browser

Admin Pages:

1.20 Existing admin screens will need to be updated per the new requirements

Event Landing Page (Run)
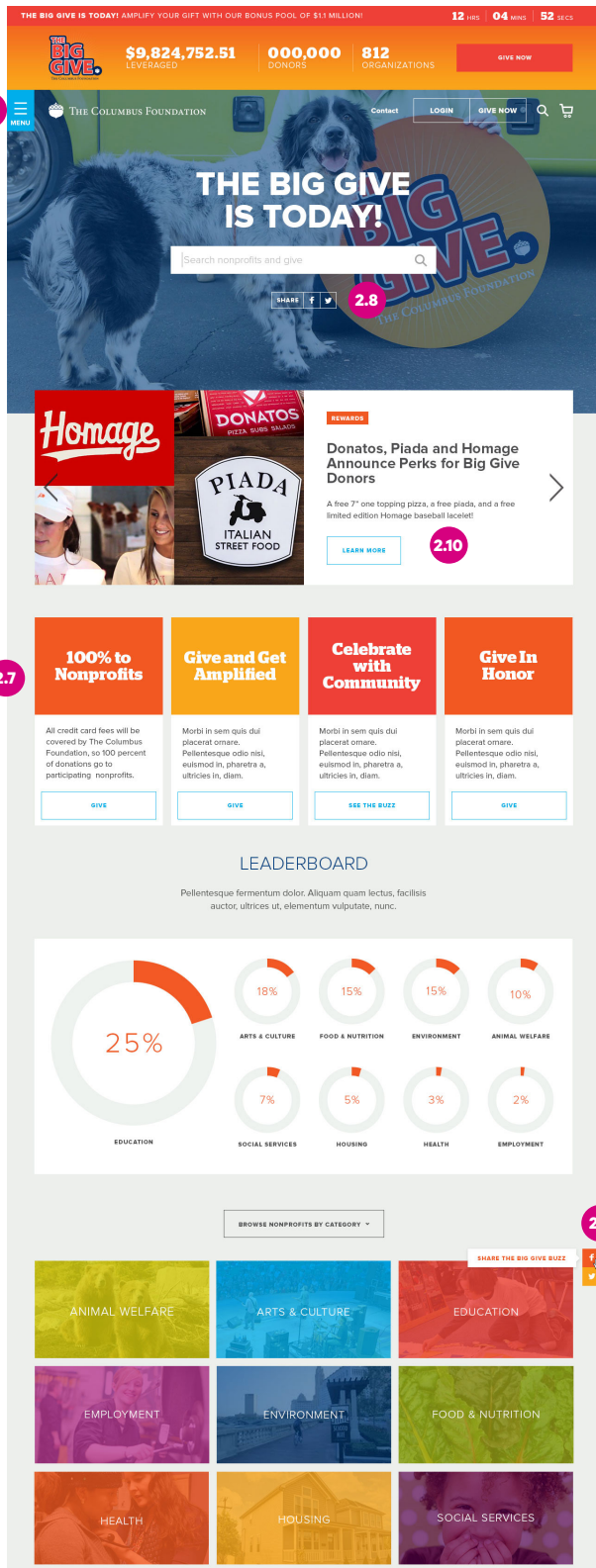
Overall Requirements

2.1   **Content will be managed through CMS. Bonus pool amount entered in administrative set up, not CMS (see 1.7)**

2.1.1   **Content must be as flexible as possible including adding, removing and reordering content blocks through a multiple field setup allowing for any number of content types (ex: adding multiple video blocks in different locations on page)**

2.1.2   **All text on this page should be editable, including all titles, headlines, subheadlines, descriptions, input text for search, button text, prepopulated social messages**

2.2   Search will also return non-participating organizations below participating organizations (visually denote search results for participating and non-participating organizations)

2.3   The Giving Store will redirect to the event landing page during Run Mode

2.4   The global nav title will change from the Giving Store for Giving Events to a **configurable name** (ex: The Big Give)

2.5   **Need CMS head access globally**

2.6   Menu behavior: animate header "up" then navigation flies out

2.7   Sidebar social icons will appear 2500px from the top of the page and will only appear on desktop. **Admin should have control over hover text, message that is shared or tweeted, and photo that is shown.**

2.8   **Ability to configure messages/images for social sharing**

2.9   **Ability to change pre-populated social messages and include ability to add photo through CMS to share along with post for Facebook and Twitter shares**

Slideshow

2.10   **Ability to change text in tag, title, description, button**

2.11   No maximum number of slides

Touts

2.12   **Should be flexible to work as 2-up, 3-up or 4-up touts depending on the content entered in CMS. Ability to have button or no button. Ability to add photo, body text, and button text.** Allow maximum of 2 rows of 4 touts (8 total).

Leaderboard

2.13   **Ability to select if leaderboard pulls stats for the following criteria: category, county, state**

2.14   **By County or by State configurable to be displayed by the non-profit recipient location**

2.15   **Ability to select whether the stats display number of transactions vs. dollar amount**

Event Landing Page (Run)
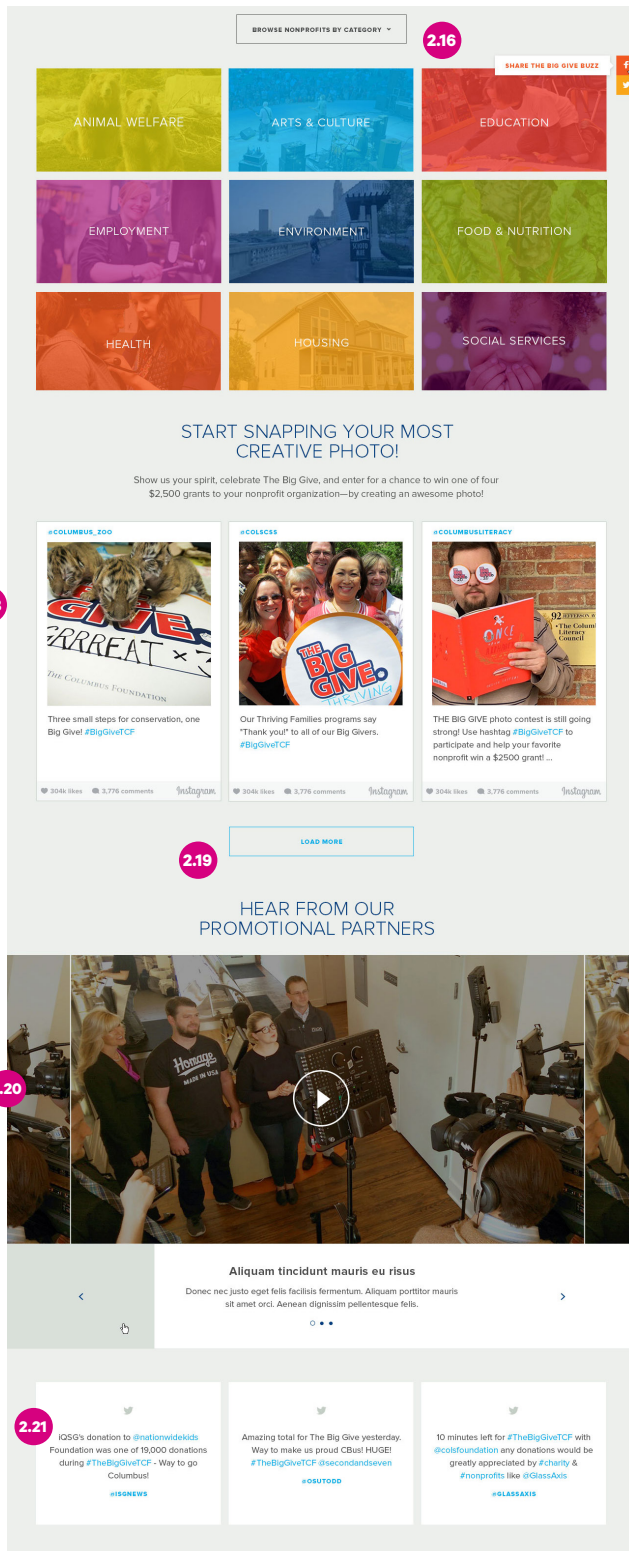
Categories

2.16 Category blocks default to open state

2.17 System should check to make sure that there are results in a category before showing that category box. If none, category box does not display and remaining tiles will fill in the grid.

Instagram

2.18 **Ability for staff to curate the Instagram images pulled in** (using Instagram API so we can see number of likes, etc.)

2.19 Load More button will load another six tiles then replace "load more" button with link out to Instagram page (**editable URL and link text**). If no more to show, default to Instagram link.

Video Content

2.20 **Ability to add videos or photos.** If one video or photos only, no slideshow. If two videos or photos, enable slideshow. Ability to add and edit text for captions.

Twitter

**2.21** **Ability for staff to curate which Twitter posts display**

Event Landing Page (Run)

BONUS POOL DONORS

A HEARTFELT THANK YOU TO THE BIG GIVE SPONSORS, who have generously contributed to the bigger-than-ever, $1.3 million bonus pool! This amazing commitment to our community will help to amplify each donation during the 24-hour online giving rally—making each dollar go even further. Thank you!

ADS	Kramer-Celeste Family Fund
Anonymous	L Brands Foundation
Blom Family Fund	Marsh Family Foundation
Central Benefits Health Care Foundation	McConnell Foundation
Chlapaty Family Fund	Medical Mutual Community Investment Fund
William H. Davis, Dorothy M. Davis and William C. Davis Foundation	Nationwide
Paul G. Duke Foundation	PNC
Walter and Marian English Fund	Siemer Family Foundation
Michael Glimcher	Walter Family Foundation
Hinson Family Trust	Seanna C. and Matthew D. Walter Fund
Ingram-White Castle Foundation	Robert F. Wolfe and Edgar T. Wolfe Foundation
JPMorgan Chase	Worthington Industries
C. Robert Kidder and Mary G. Kidder Fund	

(2.22)

PROMOTIONAL PARTNERS

PIADA ITALIAN STREET FOOD   DONATOS PIZZA SUBS SALADS   HOMAGE   jeni's SPLENDID ICE CREAMS

(2.23)

MEDIA PARTNERS

The Columbus Dispatch dispatch.com   ORANGE BARREL MEDIA   CU COLUMBUS UNDERGROUND

(2.24)

TOP FREQUENTLY ASKED QUESTIONS

(2.25)

+	VIVAMUS VESTIBULUM NULLA NEC ANTE?
+	PRAESENT PLACERAT RISUS QUIS EROS?
+	INTEGER VITAE LIBERO AC RISUS EGESTAS PLACERAT?

ADDITIONAL DETAILS

+	THE BIG GIVE DETAILS
+	REWARDS DETAILS
+	ELIGIBLE NONPROFITS
+	BONUS POOL DONORS
+	RULES & REQUIREMENTS

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OUR PROMISE To help you help others through the most effective philanthropy possible.

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Bonus Pool
2.22 Bonus pool donor names entered in CMS. No maximum on number of names.

Logos
2.23 **Flexible layout should allow for any number of logos to display. Max 4 logos per row. Min 1 logo.**

2.24 **Ability to add clickthrough links for promotional or media partner logos**

Cascades
2.25 **Ability to add any number of cascade groups necessary**

Event Landing Page (Pre-Run Activation)
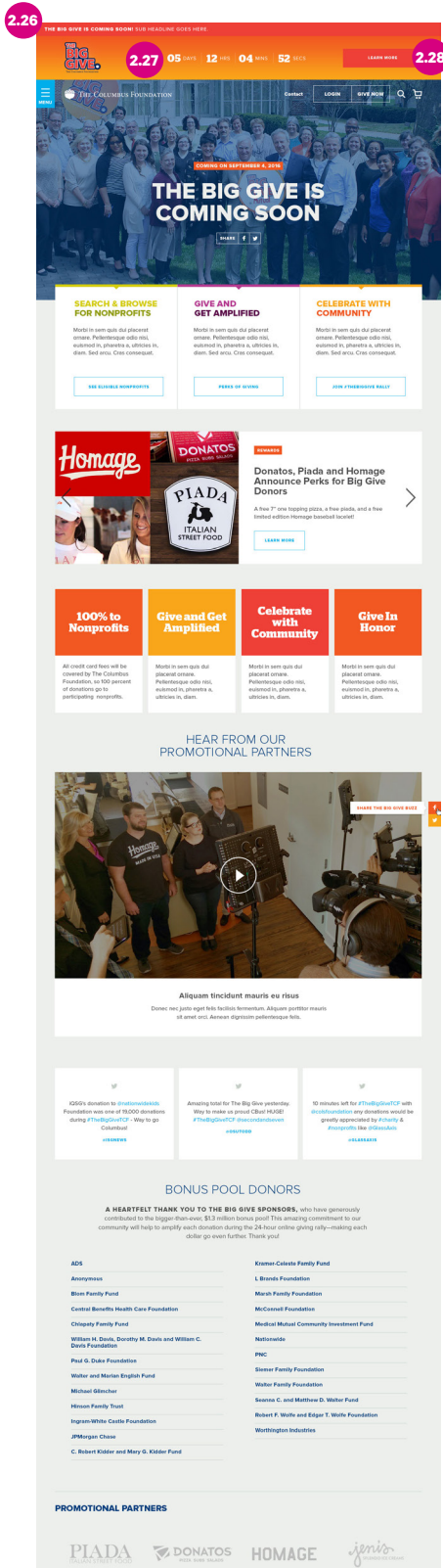
Overall Requirements

2.26 **Ability to change messaging and button label in header**

2.27 Main content will change from stats to countdown in pre-run mode

2.28 Button will link to pre-run landing page

2.29 **Content will be managed through CMS**

2.29.1 **Content must be as flexible as possible including but not limited to adding, removing and reordering content blocks**

2.29.2 **All text on this page should be editable, including all titles, headlines, subheadlines, descriptions, input text for search, button text, prepopulated social messages**

2.30 **Any requirements regarding similar content blocks listed above for Event Landing Page are applicable for pre and post event pages**

2.31 All content blocks built for Events should be available for all modes and giving day pages (pre, post, run)

Event Landing Page (Post-Run Activation)
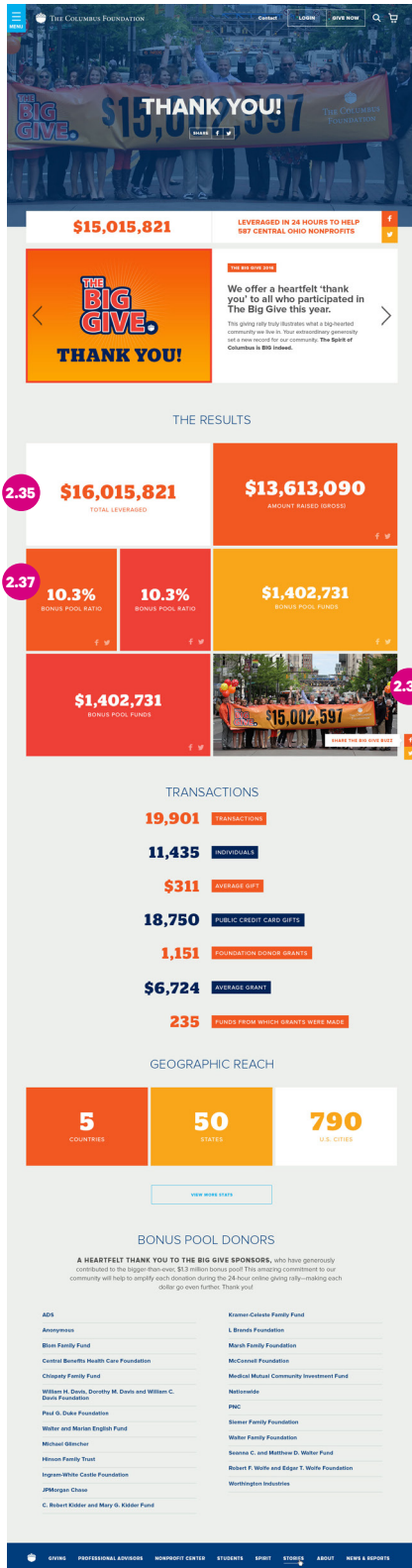
Grid Variation

Grid Variation
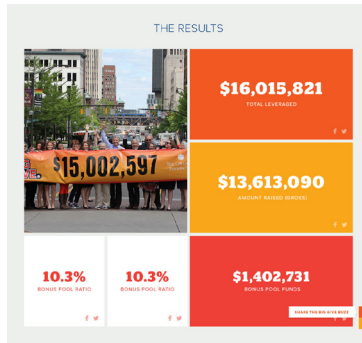
Overall Requirements

2.32 **Content will be managed through CMS**

2.32.1 **Content must be as flexible as possible including but not limited to adding, removing and reordering content blocks**

2.32.2 **All text on this page should be editable, including all titles, headlines, subheadlines, descriptions, input text for search, button text, prepopulated social messages**

2.33 **Any requirements regarding similar content blocks listed above for Event Landing Page are applicable for pre and post event pages**

2.34 All content blocks built for Giving Events should be available for all modes and giving day pages (pre, post, run)

Stats

2.35 **All stats will be entered manually in CMS. If no values, hide.**

2.36 **Will need ability to add stats as they become available over a period of time.** As elements are added, they will arrange themselves in a grid similar to how the Spirit of Columbus grid functions.

2.37 **Ability to select color theme of block and text from TCF color palette**

2.38 **Ability to replace any color block with a photo**

2.39 **Boxes have option to add a link that can be edited in CMS and link externally and internally**

Social

2.40 **Ability to turn social sharing for statistics on and off**

Home Page (During Run Event)
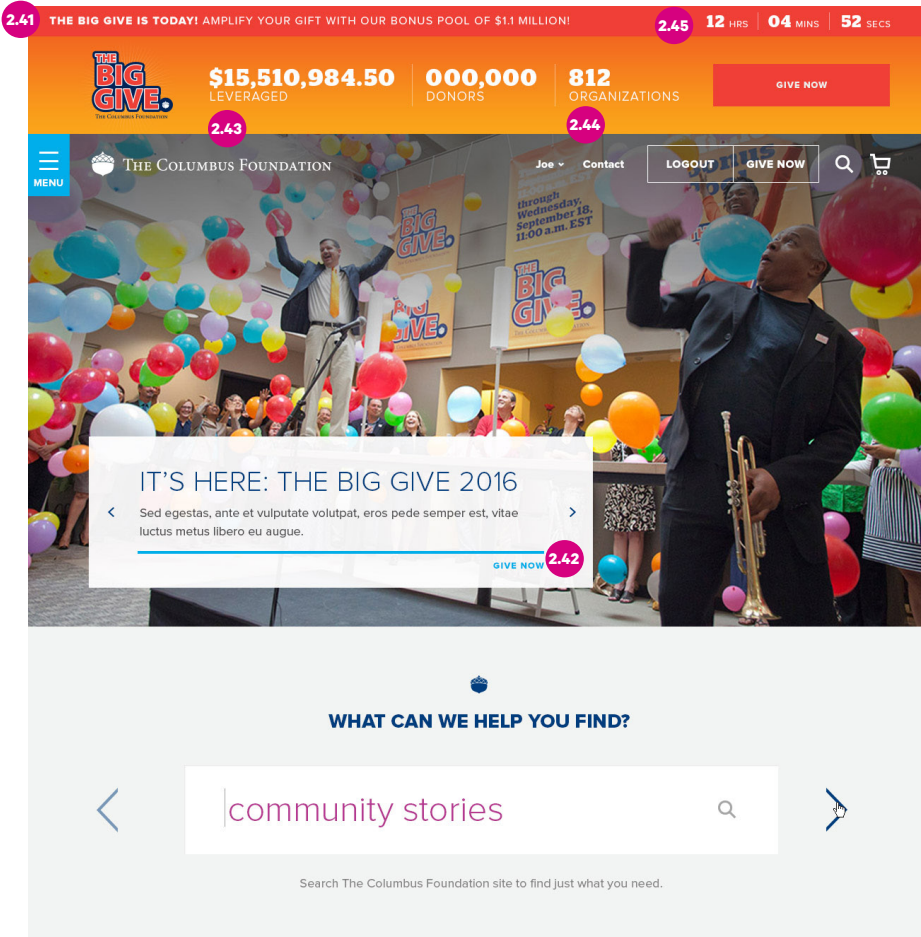
Global Banner

2.41 **Logo, text, and button text are all configurable by admin**

2.42 **Ability to change link title to "Give Now"**

2.43 This number will include the bonus pool calculation

2.44 This number will display the number of organizations who have received gifts

2.45 Will display "days" in Pre-Run mode (days will not display in Run mode)

Request Listing Form / Confirmation

Overall Requirements

3.1 Require user to log in before accessing this form; if not already logged in, prompt user to log in with the option to register

3.2 **All text and input field text should be editable by admin**

3.3 **Checkbox is for an e-communication opt-in**

3.4 Will download form to user's storage

3.5 When form is submitted, show confirmation screen and auto-send email confirmation (ex: your request will be reviewed)

3.6 **Text and link must be editable.** Option for link to open page in a new window.

3.7 Would like an auto-email to send when organization has been approved/published, declined/returned by staff. Should auto-email when an organization is able to receive gifts. This functionality should be provided for both full portraits and listings.

3.8 Send auto welcome email once staff have granted access to requested role/listing. Staff will link user with directory listing based on submitted form.

3.9 Prompt User that form information will not be saved if navigating away from the form page
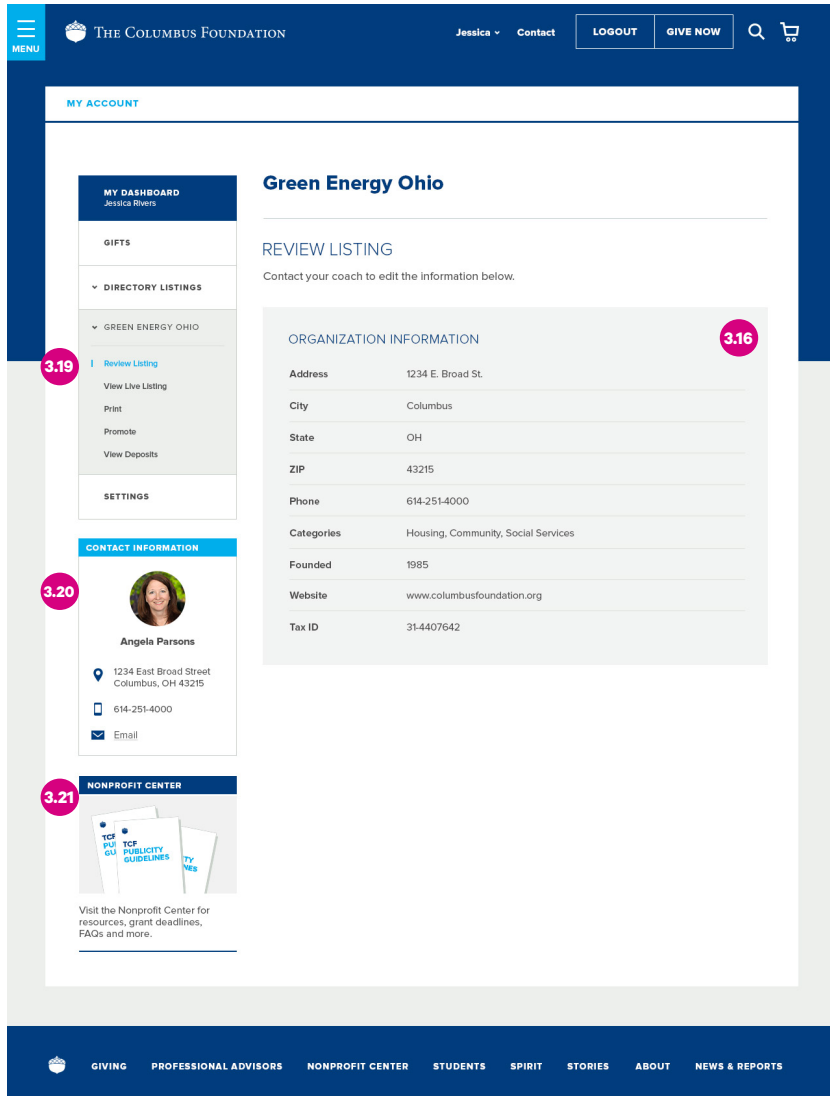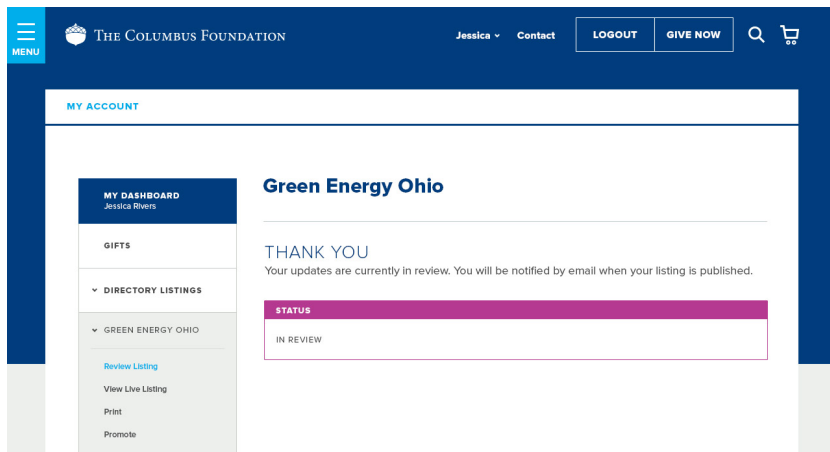
Listing

Overall Requirements

3.10 Anyone will be able to give to "Listings" every day (not specific to giving events)

3.11 Listings will display as tiles on their respective category landing pages, but will be ranked the lowest, showing after all of the 'full' portraits unless assigned higher number in sort order

3.12 When shared via social channels, include the DBA in prepopulated message at the desired part of text

3.13 Acorn will be default image for "Listings." In future, will include logo and mission uploaded by the NPO.

3.14 Touts will be dynamically pulled from the first three "placements" on the Giving Store landing page otherwise pull from CMS sorter

Review Listing

Overall Requirements

3.15 Update roles with new types: Directory Listing Editor, Directory Listing Donation Viewer (or modify definition of existing portrait roles)

3.16 **Organization Information may not be edited by nonprofit—they must contact TCF Staff to make changes**

3.17 **Staff will need ability to assign more than one editor and more than one donation viewer (existing roles)**

3.18 **Manage Users Page (Admin)—indicate if assigned NPO has portrait vs. directory listing**

3.19 Two new links: Review Listing and, once published, "View Live Listing"

3.20 **Display a general staff contact for listing users (ability for staff to enter)**

3.21 User will see touts for existing portrait editor role

3.22 **Staff option to send registration invite and nonprofit option to request access in My Account.** Trigger activity feed queue request for staff to manage requests.

3.23 Build out Directory Listing request in My Account

3.24 Show current 404 page message if a user follows a link to an inactive or not yet published portrait
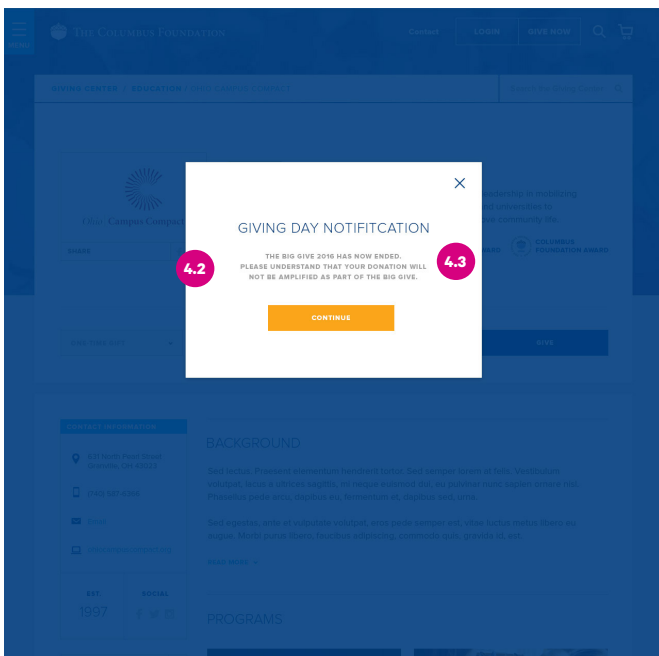
Portrait & Listing Notifications
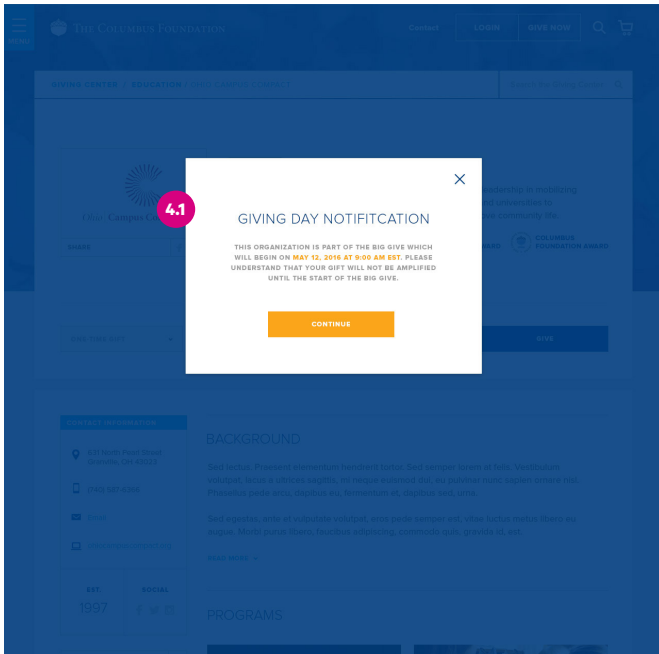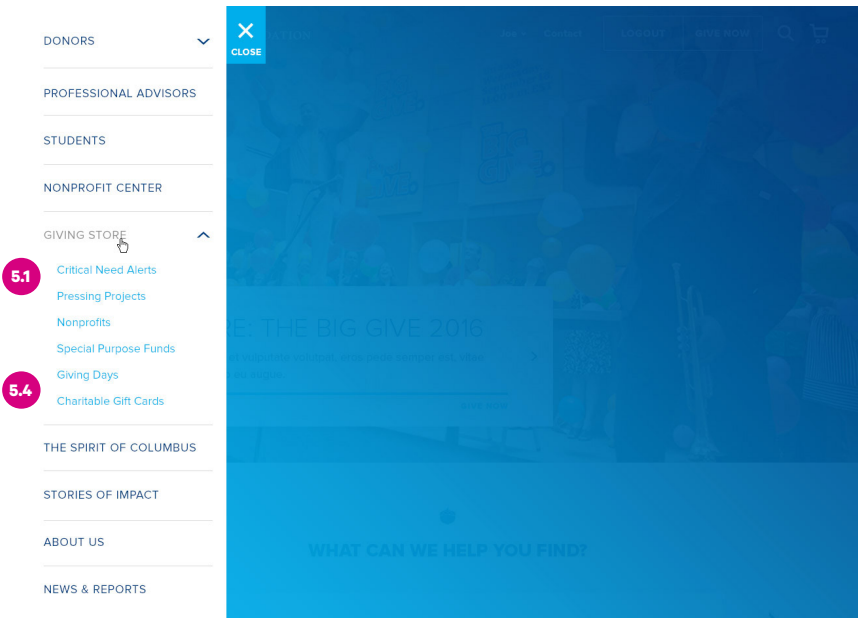

4.1   Display in Pre-Run

4.2   Display in post-run

4.3   **All text should be configurable by admin**
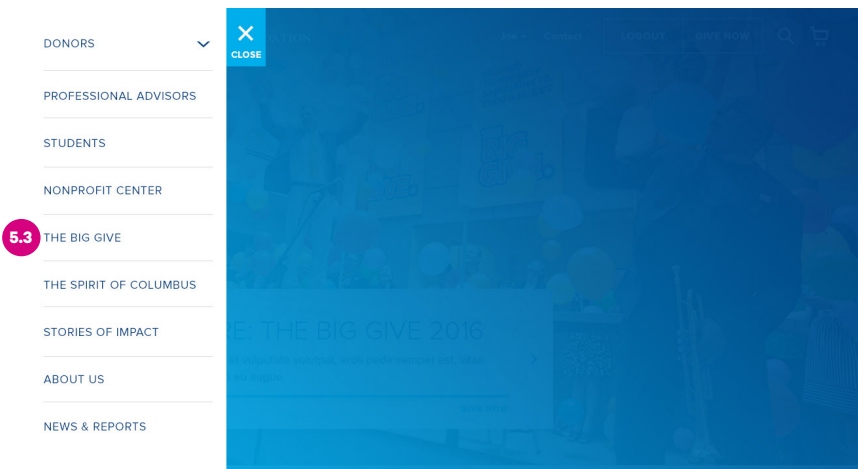
Navigation Updates

5.1 Giving Store will show subnav underneath a menu

5.2 This navigation will also display on the Giving Center Landing Page. When screen becomes too narrow to see all nav, the menu will turn into a push-down menu as is currently handled on the .org site.

5.3 When a Global Event is taking place, the name of the page will display in place of 'Giving Store' and subnav

5.4 Links may go to external site (and option to open in new window or not)

Cart Notifications

6.1 **Text should be editable**

6.2 Do not need separate grant and gift messages—we will use the same messages for all users

6.3 Bonus notification will appear next to the word "Total"

6.4 Build in 5 minute window for post run so users with donations in their carts are allowed to complete donations

6.5 Want to leave eligible donations in carts, but remove ineligible, from pre run activation to run phases—this means a user will be able to preload their cart before the event starts

Giving Event Process Matrix

Global Event Impacts (i.e. Big Give)					
Module	**Pre-Activation**	**Pre-Run Activation**	**Public Run**	**Post-Run Activation**	**Post-Activation**
Event Landing Page	Turn On Pre-Event Landing Page		Add Event Financial Stats Add Portrait Search	Show post event stats	Archive to Giving Events Section
Event Timer		Count Down to Start	Count Down to Stop	Timer Removed	
Funds			Turn Funds, Pressing Projects and Inelegable NPOs Off	Turn Funds On	
Portrait	Add to Event	Add event message		Remove Event Message	Remove from Event
Cart		Warn of pending event. Keep eligible donations so a user can preload their cart before the event starts.	Remove ineligible Portraits already in cart. Leave in eligible donations.	Remind that event is over	
Giving Store			Will default redirect to event landing	Remove redirect	
Navigation			Change Global Nav Title to Event Name	Revert Global Nav	
Social Media Checkout Msg	Adjust Text		Change Text		Revert Text

FIGURE 1