

2018 Campaign Set-Up Form

Below is information needed to build your E-Pledge site. Please return to your United Way relationship manager eight weeks before your campaign. Keep a copy for your records.

Company Name: _____

Campaign DETAILS:

Campaign Kickoff Date: _____ Campaign End Date: _____

Payroll Deduction Start Date: _____ Campaign Goal: _____

Total Number of Employees: _____ Number of pay periods _____

- If your campaign includes multiple locations or branches, please attach a list of each with address.

Epledge Site Options:

Add a goal thermometer? Include company logo?

Standard Landing Page Modified landing page

Emails:

We want to use United Way's standard email

We'd like to create our own email message

We will send emails

If you wish to send emails, please send copy to you campaign manager two weeks prior to your kickoff.

If you want United Way to send solicitation emails, please complete below. (most common)

Email Schedule:

First (invitation to donate) _____ Reminder _____

Leadership invite _____ Additional reminders _____

The first invite will go to every employee on the list. Reminder emails will only go to those employees who have yet to donate. A thank you email will be sent out the Monday following your campaign.

Will you remit payment automatically or should we prompt an invoice? _____

How often will you send payment? Circle one: monthly, quarterly, semi-annually, annually

Continued on Back

Access levels:

Indicate who on your team will be administrators (full authority and access) and who are coordinators (limited authority and access):

Name: _____ Phone: _____

Email: _____ Administrator Coordinator

Name: _____ Phone: _____

Email: _____ Administrator Coordinator

Attach a list with additional team members if needed.

Pledge Type Options:

Choose from the following pledge options

- Electronic Check (ACH)
- Payroll deduction
- Credit or Debit Card (Pay Now)
- Credit or Debit Card (Pay Later) *Donor will be charged based on schedule selected by the donor one time, quarterly or monthly*
- Cash Please provide instructions of person/place funds should be delivered to:

- Check Please provide instructions of person/place funds should be delivered to:

- I choose not to pledge at this time. By selecting this option, the donor will be coded as respondent and excluded from future email reminders.

Designations

Offering designations allows donors to designate to the United Way's Community Impact, one of United Way's Focus areas (education, income, or health), a United Way program or any 501C-3 verified nonprofit, including the United Way in the county you live in.

Is there a matching gift or corporate gift? If so, please describe and let us know when to expect (for our records). _____