



United Way
of Washtenaw County

e-Pledge Quick Guide & Agreement



Introduction to e-Pledge

ePledge is a free online donation tool that is used to manage United Way campaigns. It allows your employees to donate on a secure site that has been setup specifically for your company.

Benefits

- ✓ Eliminates the need for paper, although pledge cards can still be entered on the back end
- ✓ Use of the ePledge tool is provided at no charge
- ✓ Secure web-based tool with password-controlled access
- ✓ Customizable website creates a more personalized donor experience
- ✓ Real-time campaign stats and detailed reports
- ✓ Email tool (used to send kick-off and reminder messages)
- ✓ Automatic gift confirmation emails
- ✓ Only requires an internet connection and web browser

Is online pledging right for you?

ePledge is a free tool for you to manage your campaign more effectively. It is ideal for your organization if one or more is applicable:

- Majority of your employees have internet and email access, and are comfortable making online transactions.
- You are able to provide an employee list including employee's first and last name, email address or employee id. Also, local campaigns can have employees sign up individually however we wouldn't be able to send out emails. with donor details, name, emails, and addresses.
- You are looking for a way to eliminate paperwork and implement a Rock Star campaign.

Items Needed

1. Employee data file-Excel spreadsheet that contains a list of current employees, with the following fields:
 - Unique employee id or work email address (your preference)
 - First name, last name (separate columns)
 - Number of annual pay periods (helps us calculate total payroll gift)
 - Work Place Zip codes if multiple locations
 - Employee's work email to email confirmation or communication on your behalf
2. Website Content
 - Company logo (will be displayed on pledge site)
 - Welcome message (will be displayed on home page after log-in)
 - Email content (to be included in campaign communications to employees) templates are available. Please let your United Way contact know if you want to create your own message or use our template.

Additional items may be required, depending on your specific set-up and reporting needs.

Questions: 734.677.2229 or email epledge@uwwashtenaw.org

Campaign Timeline

The timeline gives a high level overview of each phase of the ePledge campaign process. Please note that the time frames are approximate and will vary based on your specific ePledge setup.

Preparation: (4-6 weeks before campaign kickoff) More time may be needed for companies with multiple locations.

Company

- ✓ Provide Campaign dates
- ✓ Return completed ePledge agreement
- ✓ Identify key contacts (Administrative)
- ✓ Identify reporting needs (competitions, we will need a break-out of departments or teams)

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- Contact campaign lead to begin
- Provide sample employee data file
- Provide sample website content

Set-up (3 weeks prior to campaign kickoff)

- ✓ Provide employee file
 - ✓ Identify login format (emails or employee id)
 - ✓ Provide website and email content (unless templates will be used)
 - ✓ Schedule onsite or virtual training
- Begin employee file upload
 - Create test accounts
 - Update website and email content

Company

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Testing (2 weeks prior)

- ✓ Submit test pledges
- ✓ Test users navigate pledge site
- ✓ Verify customizations
- ✓ Test the link in all web browsers
- ✓ Test payment options

Send test emails

DURING CAMPAIGN

Company

- ✓ Generate reports
- ✓ Monitor campaign stats
- ✓ Provide reminder email date(s)

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Monitor website activity
Provide help desk support

AFTER CAMPAIGN

- ✓ Provide authorization to close pledge site

Close pledge site
Provide final reports

Frequently Asked Questions (FAQs)

PREPARATION

Q: Do we have to sign a new agreement each year?

A: Yes--we need an updated ePledge agreement signed and on file for each campaign.

Q: Are campaign dates flexible?

A: Yes--We request dates so that we can plan accordingly. We understand that things can change so we are flexible.

Q: What do you mean by "key contacts"?

A: Key contacts at your organization include: employee file contact (who will provide employee data), and any individuals that need reporting access. We have a coordinator which is typically you the ECC and we have an administrator control, which is usually HR. ECC can pull reports like total figures. However only an admin can amend pledges and see donor amounts.

Q: Can you provide more detail on reporting needs?

A: Please identify if you would like to see reports segmented by department, team etc. These fields need to be provided with the employee file in order to setup this type of reporting.

SETUP

Q: What is the login format?

A: By default the user ID is employee's email address and password is randomly generated by the system. Users will receive an email from ePledge with a personalized login link. Users will be required to change password at login. Please notify United Way if you prefer a different format.

Q: Why does United Way request email addresses?

A: We send campaign communications to the email addresses. These email addresses are not shared, nor are they used for solicitation purposes.

Q: What if we are unable to provide email addresses?

A: We use the email addresses to communicate campaign and login information. If you prefer to send internal communications we can use to a standard login format. This means that the password must be something that is known by the employee. Please note that this format is not secure, unless the password is something that only the employee knows, and no one else has access to.

Q: How do employees without emails or access to computers pledge?

A: These employees can submit paper pledge cards to be entered on the back end.

Q: Can you provide sample website content and emails?

A: Samples are located on the final two pages of this guide.

QA & TRAINING (quality assurance)

Q: What do you mean "QA"?

A: We ask that you (and any identified test users) login to the pledge site to confirm that everything is working properly on your end.

Q: What does training include?

A: UWWC's Operation team will provide web-based training. Sessions usually last about an hour. They include training on the pledge and administrative site.

DURING CAMPAIGN

Q: What if I have trouble accessing the site?

A: Contact ePledge@uwwashtenaw.org or 734.677.7229. Contact info is also listed on the pledge site.

Q: How does reminder emails work?

A: By default, reminder emails only go to employees that have not logged in and completed a transaction. You only need to provide the date the email should be sent.

Q: How do we handle pledges for new hires?

A: You can provide a "new hire" employee file for us to import, or you can have them complete a paper pledge form.

Q: How do we enter paper pledge forms?

A: Submit to United Way. UW contact will set up.

Q: What do we do with cash/checks?

A: Please submit along with a paper pledge form to United Way.

Q: What if someone forgets to print their confirmation page or deletes their confirmation email?

A: Please contact ePledge or 734.677.7229 and we can resend the confirmation email.

Q: Can donors update their pledges?

A: Yes, pledges can be updated (by the donor) until the end of each month. After that changes should be submitted to United Way for update.

Q: Am I allowed to enter multiple pledges?

A: By default the system will allow one donation. This is to prevent duplicate pledges. Please contact United Way to enter an additional pledge.

AFTER CAMPAIGN

Q: What is a payroll deduction file?

A: This is the report you provide your HR department so they can initiate payroll deductions for each employee that pledged.

Q: How do we handle paper pledges received after the campaign has closed?

A: Please forward to your United Way Development Officer.

Q: Can I access reports after the campaign has closed?

A: Yes, reports will still be available after the pledge site has closed.

Notes:

2018 Campaign Set-Up Form

Below is information needed to build your ePledge 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.

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

How often will you send payment? Circle one: monthly, quarterly, 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
- 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). _____

ePledge Agreement

United Way of Washtenaw County is here to support you to ensure you have a successful campaign. Part of making a successful campaign is meeting our partner's expectations by making our Giving process as smooth as possible. UWWC's trained e-Pledge specialist will work with you to set up your e-pledge site and assist you in downloading reports and managing your campaign. We look forward to helping you manage a successful campaign. Below is additional information about our data security and privacy policy.

Privacy Policy: UWWC values our donor's privacy. We adhere to the highest standards and strictest guidelines when dealing with donor information.

The information we collect: UWWC will not rent, trade, sell or share donor information.

Access to the information: Only United Way employees may access donor information in order to perform pledge process and administrative functions and are prohibited from disclosing donor details to third parties.

Your participation is voluntary: Your relationship with UWWC is voluntary. We use donor's information to send you an acknowledgement of your gift and info we think you may find of interest. You may opt out of future communications as any time.

Data Security: Our donor database is housed off site by United Way Information Technology Services (UWITC) UWITC services are hosted state of the art colo (rented data center facility) in Newark, Delaware, and Denver which are staffed 24/7. These facilities have SAS70 certification as well as a PCI DSS certification. UWITC utilizes an IDS system that scans all network traffic to report on a suspicious behavior or patterns as well as scans all systems monthly for security problems.

Name: _____ Signature _____
Campaign Coordinator

Name: _____ Signature _____
United Way Staff