United Way
of Washtenaw County

e-Pledge

Quick Guide

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: Call/email your campaign manager 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	United Way
✓ Provide Campaign dates	Contact campaign lead to begin
✓ Return completed ePledge agreement	Provide sample employee data file
✓ Identify key contacts (Administrative)	Provide sample website content
✓ Identify reporting needs (competitions, we will need a break-out of departments or teams)	

Set-up (3 weeks prior to campaign kickoff)

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

Company	**United Way**
<u>Testing</u> (2 weeks prior)	
✓ Submit test pledges	Send test emails
✓ Test users navigate pledge site	
✓ Verify customizations	
✓ Test the link in all web browsers	
✓ Test payment options	

<u>DURING CAMPAIGN</u>

Company	**United Way**
✓ Generate reports	Monitor website activity
✓ Monitor campaign stats	Provide help desk support
✓ Provide reminder email date(s)	

<u>AFTER CAMPAIGN</u>

✓ 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: If you would like we can review the website with you and we will provide you with the email templates.

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: Your campaign manager 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 call your campaign manager.

Q: How do 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: Contact ePledge@uwwashtenaw.org or call your campaign manager 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: