

E-Pledge Campaigns

LIVE UNITED

What Is E-Pledge?

E-Pledge is an internet and e-mail based tool designed to make giving quick and easy by allowing donors to input their pledge directly into the United Way database using a secure on-line interface. E-Pledge significantly reduces, or even eliminates, the paper forms traditionally used in the course of an employee workplace campaign, resulting in improved efficiency for all parties and reduced administrative costs.

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Features:

- Receive immediate results from employees that pledge online
- Reduces reliance on paper pledge forms
- Allows CEO/ECC to personalize the “ask” to the employees
- Gifts are immediately visible by the company and Brown County United Way
- ECC can pull a variety of reports to evaluate campaign success
- Option for real-time updates on departmental and company-wide goals
- Highly secure environment

Benefits:

- No transaction fees
- Campaign data will be reflected immediately and accurately
- All communications and pledging via a secure web site, enabling access from work, from home or while traveling
- Quick and simple site navigation
- Validates all pledges before submission
- Payment choice of payroll deduction, credit card, cash/check, direct bill, or gift of stock
- Reduces cost associated with administering a “manual, paper-based” workplace campaign
- Provides easy communication with all employees regarding company’s mission and community involvement
- On-site management of the E-Pledge campaign, and quick response time for donors requiring assistance
- Delivers real-time reports



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What the United Way Needs From You

Preparation (for multiple locations prep time will be longer):

- Primary Campaign Contact (name, phone number and e-mail address)
- Technical (IT) Contact (name, phone number and e-mail address)
- Payroll Department Contact (name, phone number and e-mail address)
- The kick-off date and end date for the campaign.
- Confirm sign-on method (via email, unique identifier or self registration)

Site Setup:

- A data file containing employee information
 - ◇ Employee name (First and Last)
 - ◇ Employee Email
 - ◇ Employee ID or Unique Identifier
 - ◇ Information to track/sort transactions—optional (department, location)
 - ◇ Number of Pay Periods
 - ◇ If multiple site are being set up, work location for each employee
- Site customization requests
- Text for kick-off and reminder e-Mail messages
- Text for welcome letter to appear on the e-Pledge home page
- List of test users

Testing & Training:

- Check data for accuracy
- Test all screens, functions, and reports to verify they are working as expected

During the Campaign:

- Forward any checks to your Campaign Coordinator or Brown County United Way
- Provide specific dates when you would like reminder e-Mails to be sent

After the Campaign:

- Provide the required date and format for the payroll file



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E-Pledge Timeline

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Preparation: At least 4-6 weeks prior to the campaign

- Provide BC UW with a campaign details
 - ◇ Kick-off and close dates
 - ◇ Names of any key contacts that are involved in running the E-Pledge campaign (ECC and payroll contact)
 - ◇ If you have multiple locations, send location names and addresses, including city, state and zip.

Site Set-Up: At least 3-4 weeks prior to the campaign

- Send BC UW the full employee data file
- Send BC UW customized welcome message for the e-Pledge home page
- Send BC UW the e-mail template that will contain the personalized invite to the campaign
- Provide BC UW the names of employees that will be involved in testing the system prior to the campaign kick-off.

Testing & Training: At least 2-3 weeks prior to the campaign

- BC UW will set up and send your employees that test E-Pledge a test version of the e-Mail with their personalized link. Any issues that arise during the testing process will be addressed and necessary changes will be made.
- BC UW will work with your company in regards to the administration side of E-Pledge

During the Campaign:

- Continue to run rallies, special events, or other company events
- On kickoff date, BC UW will send out the personalized invite email.
- Real-time reports will be available to help monitor the status of the campaign
- Reminder emails can be sent out to non-respondents

After the Campaign:

- BC UW will work with your company to determine a final campaign close date
- BC UW will work with your company to create a payroll file that will integrate with your payroll system
- BC UW will assist in any reporting that is requested by your company



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