

United Way e-Pledge 2018

Easy online giving
Easy online reporting

<https://ecommunity.uwaywrc.ca>



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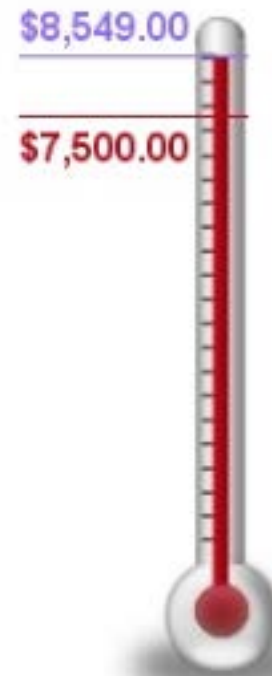
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Communities

e-Pledge

- Allows workplaces to collect and track employee donations online
- The system speaks directly to our database
- Used by many United Ways in Canada and USA



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Benefits

- Say good bye to tracking donations on the Donor Financial Summary Spreadsheet!
- Eliminates/reduces paper donation forms and manual tracking
- Increases efficiency of campaign administration
- Increased ease for payroll department
- Increases accuracy and confidentiality of donor information

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Getting Started

What is required?

- Employee information prior to campaign kick-off (employee ID, name, pay periods, email, and employee type (employee or retiree))
- Internet access for employees
- Campaign Team e-pledge training
- Continued efforts in canvassing employees and sharing communication about the United Way

Our Commitment

- To maintain the confidentiality of all employee information
- To work with you to ensure smooth implementation of online giving
- To provide training and support throughout your campaign



How it works – Set Up

E-Pledge Set Up Agreement

Please provide the following information and consent for the setup of online giving as part of your United Way Workplace Campaign.

Contact Information	
Organization:	
Employee Campaign Manager:	Email:
E-Pledge Administrator:	Email:
E-Pledge Administrator:	Email:
HR/Payroll:	Email:
Training Dates	
e-Pledge Admin/Payroll Training:	Location:
Committee Training Date/Time:	Location:
Campaign Dates	
Campaign Launch:	Campaign End:
e-Pledge Launch Email:	e-Pledge End Email:
Reminder Email 1:	Reminder Email 2:

Privacy Statement

United Way Waterloo Region Communities is committed to protecting the privacy of your employees. The employee information provided for setting up online giving will be used to solicit your employees as part of your workplace campaign, acknowledge and recognize gifts, process and receipt donations and share information about United Way events. An employee can unsubscribe at any time by clicking the unsubscribe button present on all of our communications. United Way does not sell or lease personal information.

By agreeing to implement employee online giving as a part of your United Way Workplace Campaign, you consent to the use of employee information, as provided by your workplace, to solicit employees for your workplace campaign.

Names Emails Emp IDs Pay Periods Employee Type (Employee or Retiree)

Signature – I have the authority to bind the organization

Date

Name (Please Print)

Title

Please provide the following information to Epledge@uwaywrc.ca no less than 3 weeks before your campaign begins to setup your e-Pledge website for your employees.

Employee Data File - A template of the file will be provided.

- e-Pledge Admin will upload through the "Documents" page.
 Will email it to Epledge@uwaywrc.ca

Company Logo – to be displayed on e-Pledge landing page

- Yes – will send a jpg or png file, no larger than 400x400 pixels No

Fundraising Goals – have you set goals for the campaign?

- Financial - \$ _____ Participation - _____%

Campaign Thermometer

- Yes - Please display on Employee Home Page – to be displayed on the e-Pledge landing page
 Dollars Raised Percent of Goal Percent of Participation
 No Thermometer, thanks

Landing Page Message

- We will provide customized messaging to add to United Way messaging
 Use only United Way messaging

Email Messaging

- We will provide customized messaging for each email
 Use generic United Way messaging

Giving Options – what options do you want available to employees? (Check all that apply)

- Payroll Credit Card Cash Cheque

Pay Periods for Payroll Deduction – please confirm with payroll department

- Fixed – payroll deductions will only be spread equally over the year. Number _____
 Flexible – employees can have deductions taken over a chosen number of periods.
 Other – only set number of payroll periods options available (eg. 1 and 26): _____

Gift Auto-renewal – the option for employees to give the same payroll donation year after year.

- Yes – confirm with your HR/Payroll Dept No

Pledge Replication – the option for employees to give the same gift as last year

- Yes No

Retirees

- Yes, retirees will be included in the employee data file (please identify clearly as retiree employee type)

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How it works – Set up

Employee File – sent *at least 3* weeks before the campaign

	A	B	C	D	E	F	G	H	I
1	Employee ID	First Name	Last Name	Pay Periods	Email Address	Email Type	Org ID	Preferred Em	Employee Type
3	123456	Taylor	Swift	26	tswift@companyxyz.ca	@epledge	87654321	1	PE
4									
5									

Customization options:

- Logo
- Campaign goal
- Thermometer
- Messaging
- Giving options
- Pay periods

Set up a meeting to work through all the options!



How it works – Employee Donors

- Every employee gets an email with a personalized donation link (or you can choose self-registration)
- Email content can be personalized by your campaign team with your messaging
- Able to send multiple emails throughout your campaign (e.g. beginning of campaign, mid way, final push)

Friday is the last day of the Giffen 2015 United Way Campaign. We hope you've had a great time participating in all the activities that have been taking place!

This year your goal was set at \$8750, and you're more than half way there! Check out the attached PDF to see how many people in our community can be helped with the dollars raised so far, and how many could be helped if the goal is reached. Your gift makes a difference!

[Click here](#) to access your personal giving page and make your gift today.

Behind every changed life is someone who helped make it happen. Thank you.

This link contains your personal login information - please do not forward this email or share it with others.

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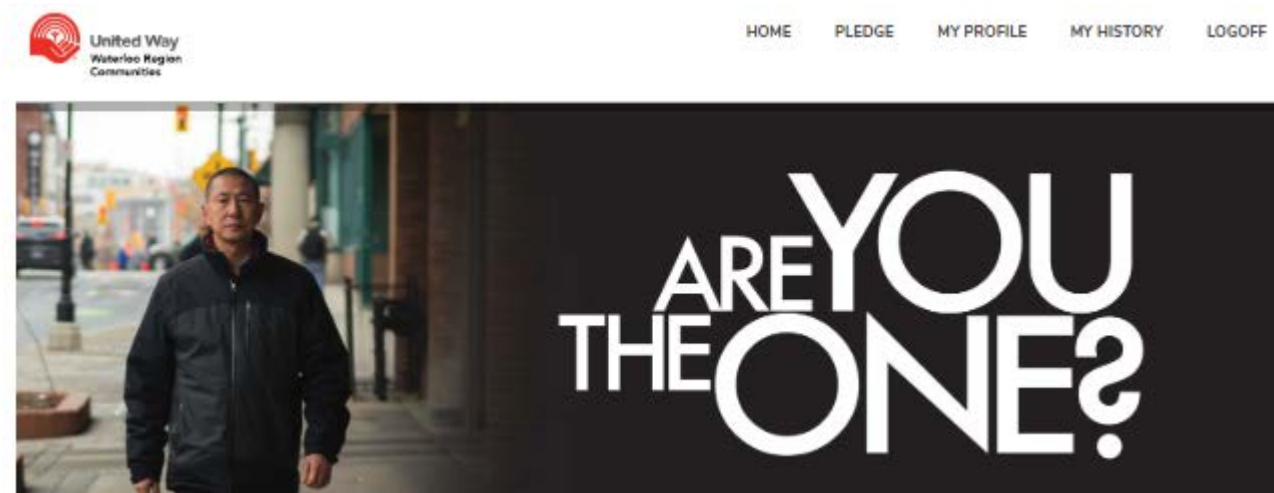


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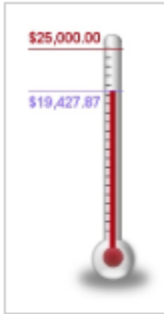
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How it works – Employee Donors



Your Logo  United Way
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Your Goal



Messaging

WELCOME JENNIFER,
YOUR DONATION TO THE 2017 CAMPAIGN WAS: \$0.00

1 in 10 people in Waterloo Region live in poverty.
1 in 20 households in Waterloo Region experience hunger.



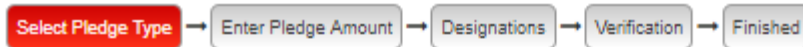
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How it works – Employee Donors



PLEASE SELECT HOW YOU'D LIKE TO MAKE YOUR DONATION.

- Credit Card One-Time Gift
- Credit Card Monthly Gift
- Payroll Deduction
- Cash
- Cheque

Offer the options to your employees that make sense for your campaign. Don't want to chase cash donations? Remove the option.

During the pledge process, please use the next and back buttons below and not your browser back button.

Next

Cancel



How it works – Employee Donors

Turn on or off – does your payroll system allow for different #s of deductions?



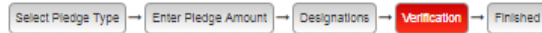
Deductions will begin on the first pay date in January 2019.

Deduction Per Pay:	<input type="text" value=""/>
Pay Periods Per Year:	<input type="text" value="26"/>
Number Of Deductions To Make:	<input type="text" value="26"/>
Total Annual Pledge:	<input type="text" value="\$0.00"/>
Do you wish to designate your donation (OPTIONAL)? (\$100 minimum)	<input type="checkbox"/> Yes

If no, please leave the box empty and click "Next" to proceed to pledge Verification page.



How it works – Employee Donors



PLEASE CONFIRM YOUR INFORMATION BELOW.

Recognition Name

Line 1:

Jennifer Annett

Line 2:

Main Address

Address Line 1:

1157 Clyde Rd.

Address Line 2:

City:

Cambridge

Prov:

Ontario

Postal Code:

N1R 5S7

Country:

Canada

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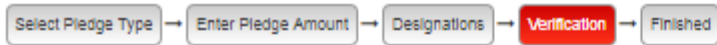


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How it works – Employee Donors



PLEASE REVIEW YOUR PLEDGE AND CONFIRM IT BELOW:

Pledge Type:	Payroll Deduction
Pay Periods Per Year:	26
Number of Deductions:	26
Deduction Per Pay:	\$3.85
Total Current Pledge:	\$100.00
Total Pledge Year To Date:	\$600.00

Confirmation page may take a few moments to display. Please click Confirm only once. Thank you.

- Confirm** Your pledge will be recorded... Thank you!
- Previous** Go back and change pledge information
- Cancel** Exit e-Pledge (no pledge will be recorded)



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How it works –Administrator

- e-Pledge Administrator has access to
 - Real time reports
 - Adding/updating donations received through paper
- Role change menu from Employee Donor to e-Pledge Administrator (bottom of page)

EMPLOYEE DONOR

SWITCH ORGANIZATIONS

LOGOFF



United Way Waterloo Region Communities | 50 Sportworld Crossing Rd (East Building), Suite 220 Kitchener ON N2P 0A4 Canada | <http://www.uwaywrc.ca> | Ph: 519-888-6100
[privacy policy](#) | [contact us](#) | [learn more](#)

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How it works – Admin Access

- HOME
- ORGANIZATION PROFILE
- CAMPAIGN STATUS
- ADMIN
- LOGOFF

WEB REPORTS

- Campaign Summary Report
Summarizes campaign statistics for the overall campaign
- Cash/Cheque Report
Shows all donors in the workplace that have pledged by cash or cheque.
- No Response Report
List of employees who gave last year and have not yet given to this year's campaign
- Payroll Report
List of all employee payroll donors with number of pay periods, number of deductions and amount deducted per pay.
- Pledge Response - with gift type
List of all employee donors with giving type.

Access Reports, Employees and Transactions, Email Employees, Upload Documents.

Submit

Campaign Status

Name	Campaign Type	Total	Goal	# Emps	# Donors	Participation Rate	# Responses	% Responses	Average Gift	Gift per Capita	
United Way Waterloo Region Communities	Emp	\$16,455.85	\$25,000.00	28	25	89%	25	89%	\$658.23	\$587.71	
United Way Waterloo Region Communities	Corp	\$226.26	\$0.00								
United Way Waterloo Region Communities	Special	\$2,745.76	\$0.00								

All Locations



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e-Pledge System Security

- **System server** - Held in a locked room on-site, only accessible by United Way Admin staff and log in only possible with Admin credentials
- **Sonicwall firewall** - “One of the most secure, sophisticated and widely deployed small-business firewall platforms on the market today” with intrusion prevention, anti-malware, anti-spam, and content and URL filtering
- **SSL Certificate** – Renewed each July to ensure we have the most up-to-date security

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ANY
QUESTIONS
?

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For More Information:

United Way Waterloo Region Communities
50 Sportsworld Crossing Rd (East Building), Suite 220
Kitchener, ON N2P 0A4

ePledge@uwaywrc.ca
(519) 888-6100 x253

Speak with the Database Specialist or your Philanthropy Specialist

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