



e-Pledge Setup 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 Date (e.g. e-Pledge Admin, Payroll, Committee)	
Date:	Location:
e-Pledge Campaign Dates	
Start:	End:

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. 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.

Please check which employee information you will provide:

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

Name (Please Print)

Title

Signature

Date

Please provide the following information to ePledge@uwaywrc.ca *no less than 2 weeks before your campaign begins* to setup your e-Pledge website for your employees.

e-Pledge Access (select one or both)

- Send employees a personal e-Pledge access link via email
- Create a self-registration access link our organization can share

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

- Will upload through the e-Pledge "Documents" page or other file sharing location
- Will email it to ePledge@uwaywrc.ca
- Will be a complete staff list (all others in United Way database will be expired)
- Not Applicable (we are not providing employee data file)

Organization 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?

- Employee Gift - \$_____
 - Participation* - _____%
 - Special Events - \$_____
 - Corporate Gift - \$_____
- *If using participation, please specify number of employees engaged in e-Pledge campaign: _____

Campaign Thermometer

- Yes - Please display on Employee Home Page
If yes, please specify the preferred thermometer type:
 - 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

Emails

Messaging:

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

Dates:

- Launch email: _____ Time: _____
- Reminder email 1: _____ Time: _____
- Reminder email 2: _____ Time: _____
- Wrap-up email: _____ Time: _____

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

- Payroll
- Credit Card
- Pre-authorized Credit Card
- Cash
- Cheque

Pay Periods for Payroll Deduction – please confirm with payroll department

- 1 or 26
- 12 or 26
- 26 or 52
- 24
- Custom –Please specify number_____
- Flexible – employees can have deductions taken over a chosen number of periods.

Pledge On-Going Replication (Perpetual Pledge) – a convenient option for employees to repeat the same pledge *year-after-year* (“Renew My Gift Until I Tell You To Stop”).

Yes – confirm with your HR/Payroll Dept No

Pledge One-Time Replication – a convenient option for employees to pledge the same as last year, increase by a specified amount, or change their pledge type altogether *for this campaign year only*.

Yes No

Retirees

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

Other Data – what other data does your organization need through e-Pledge (collected when your employees donate)?

Employee ID Department/Branch Other (specify): _____

e-Pledge System Security

- System server – Held in a locked room on-site, only accessible by United Way designated system administration staff and log in only possible with System 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
- Network and system servers are monitored 24x7 by Security Operations center

Workplace Technical Recommendations

To ensure the smoothest possible launch of your electronic campaign, the following pre-requisites are recommended for each desktop that will be using e-Pledge:

- Configure email server to Whitelist incoming email from ePledge@uwaywrc.ca
- Java script enabled – version 8 or newer
- Session cookies allowed
- All users have their security set to the Internet Zone instead of Local Intranet
- Allow PDF attachments (for tax receipts)
- Browsers should have the Internet options/Advanced “Do not save encrypted pages to disk” unchecked so they can print PDFs
- The following will be the minimum browsers supported: IE 10+, Edge 13+, Firefox 42+, Chrome 48+, Safari 7.1+, Opera 37+, Mobile: iOS Safari 7.1+, Mobile Android Browser 4.4+, Chrome Mobile 48+
- Windows 7+
- If the e-Pledge screen does not appear quite right, donors are advised to attempt login from a more updated computer system.

For more information, please contact ePledge@uwaywrc.ca or 519-888-6100 x253

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**ARE YOU
THE ONE?**