

# WELCOME TO ePLEDGE

Get rid of your pledge forms. Keep your campaign.

*“On-line pledging to United Way is easy and saved our organization and the United Way both time and money. FedEx Ground has had great success over the past 15 years conducting our national campaign online with 98% of all pledges being done online. Our employees liked the quick, easy and accurate process with instant pledge confirmation. Why did we ever use paper?”*

*Leland E. Holly III  
SVP Human Resources  
FedEx Ground*

## WHAT IS ePLEDGE?

ePledge is an online campaign management tool that fits seamlessly into your existing United Way campaign. It's a more efficient, secure, and engaging way for your employees to give to the causes they care about.

## WHY ePLEDGE?

**Spend time fundraising, not pushing paper.** Free up your campaign coordinators to do what they do best: engage with employees and raise more money. Going paperless means no more paper pledge forms, cash, or checks to track and submit. If you've been using an internal electronic pledge tool, ePledge is an easy, secure way to streamline the transfer of information between United Way and your Payroll department.

**Ensure donor privacy.** Online profiles for each employee allow for a confidential pledge that only the donor can see. Payments are handled automatically and securely through our PCI-compliant system. Your Payroll department can download sensitive payroll reports directly from our secure portal. This reduces the number of people who see employee pledge information.



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**Give donors control of their personal information.** Donors can login and view their information, anywhere, anytime. Through their secure profiles, employees can see their personal giving history and transaction details, update their contact information, and set their contact preferences.

**Get real-time campaign intelligence.** Track your company's campaign results through online dashboards and reports. At a glance, see your participation rate and goal progress. Immediately find out exactly where follow-up is needed to push your campaign to the next level.

## WE'RE HERE TO SUPPORT YOU

United Way's staff will work with you every step of the way to set up your company's ePledge site and assist you in downloading reports and managing the campaign. You can be involved as much or as little as you prefer. We're here to help your company have a successful – and easier – campaign.

### **Personalize your campaign.**

Customize the ePledge experience to highlight your company's mission. You can easily customize your company's campaign homepage and e-mail communications to reflect your brand and values.

### **Automate campaign communications.**

Let ePledge do the talking. We'll kick off your campaign with a customized e-mail to each employee containing their unique login link, and we'll thank everyone for their participation with a confirmation e-mail. With a few clicks, campaign coordinators can compose and send pledge reminders and status updates. Campaigns just got a lot easier.

*"We used online pledging to "brand" our entire United Way Campaign. All of our communication efforts were managed through e-mail and all our support materials encouraged employees to make their contribution to the United Way online. Our employees found online pledging to be simple, secure and time efficient; the reports the United Way generated were timely and all-inclusive, and the United Way staff made the management of our campaign easy."*

*Julie Drazdik  
Corporate Communications,  
PNC Bank*

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## HOW DO YOU GET STARTED?

1

**Six weeks** before the start of your campaign, complete and submit your Campaign Planning Survey and an Excel spreadsheet with the following employee information:

**Required:**

- E-mail address
- Unique employee ID number, but not SSN
- First name, middle initial, last name
- Number of pay periods per year
- Work zip code

**Preferred, but not required:**

- Home address
- Gender
- Ethnicity
- Birth date

2

**Four weeks** before the start of your campaign, submit logos, images, and text that you would like to customize your ePledge site and communications. Use United Way's templates, or create your own.

3

**Two weeks** before the start of your campaign, assign at least one person your staff to complete ePledge Administrator Training. United Way staff will provide one hour of training to orient your staff on how to run a campaign using ePledge. This training can be completed via web conference or in person at United Way's office.



**Our staff will work with you to ensure that your company's ePledge site will be ready to launch one week before your campaign begins.**

# WELCOME TO ePLEDGE

## FREQUENTLY ASKED QUESTIONS

**Q. What if someone loses or deletes their link?**

**A.** Employees should contact the United Way Help Desk at [support@unitedway-bfco.com](mailto:support@unitedway-bfco.com) or at (509) 783-4102 to have their link resent.

**Q. What if all our employees don't have an email address or easy access to the website?**

**A.** If there are a large number of employees who do not have e-mail or computer access, you may want to consider a mixed campaign where those employees can continue to submit paper pledge forms.

**Q. What about employees hired after we send the data file? Can they use ePledge?**

**A.** A new employee can easily be set up for ePledge at any time. Simply send all the data elements for the new employee (name, work email address, etc.) to [support@unitedway-bfco.com](mailto:support@unitedway-bfco.com). The new employee will be set up and a personalized login link will be sent.

**Q. What if I want to change my pledge?**

**A.** While the campaign is still open, employees can log into ePledge and change their pledge. Employees who wish to change their pledge after the campaign is closed should contact the United Way Help Desk at [support@unitedway-bfco.com](mailto:support@unitedway-bfco.com) or at (509) 783-4102 to make the requested amendments.

**Q. How do I enter special events or a corporate gift in ePledge?**

**A.** You don't. ePledge is a tool only for tracking employee pledges.

**Q. How do I manage our corporate gift, special events, and paper pledge forms?**

**A.** Since these are not entered into ePledge, put them in the white campaign envelope, complete the requested information on the front of the envelope, and contact your United Way staff representative to pick it up.

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**Q. Is ePledge able to handle a campaign with multiple locations or a national campaign?**

**A.** Yes.

**Q. How do I customize my campaign?**

**A.** Simply provide United Way with custom wording for the kickoff email, home page message and non-respondent emails. We can also apply your logo and images to your ePledge site.

**Q. Will the information be shared?**

**A.** No. United Way does not rent, trade, sell or share any information about our donors.

**Q. Is ePledge secure?**

**A.** Yes. Each link is unique to the individual and contains an embedded user ID and password. No one can access your site without it. The website is protected with SSL encryption and online payment processing is PCI compliant.

**Q. When does ePledge shut down? Does the employee's personalized link become automatically unusable after the campaign end date?**

**A.** The campaign shuts down at the customer's request, not to exceed the date when United Way submits the payroll file to the company. Each employee's personalized link is usable until that point in time.

**Q. When do I get my payroll file?**

**A.** United Way submits the payroll file one to two weeks after the campaign is closed. Typically, you provide the campaign close date on the Campaign Planning Survey.

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United Way of  
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