

United Way of Delaware County e-Pledge Quick Facts

Welcome

Thank you for using United Way of Delaware County's (UWDC) e-Pledge system. This electronic tool, presented in partnership between your organization and UWDC, is designed to make giving quick and easy.

e-Pledge significantly reduces, or even eliminates, the paper forms traditionally used in the course of a workplace campaign, resulting in improved efficiency for all parties, reduced administrative costs and more donor dollars to support our community.

Your United Way e-Pledge Team

Data Systems Manager

Your Data Systems Manager is your point of contact for any questions or concerns specifically related to the electronic pledge process. She will help with set up, reporting options, and issue resolution.

Gail Gregory
614.436.UWAY (8929)
ggregory@uwaydelaware.org

Director of Workplace Campaigns

Your Campaign Director is your primary point of contact throughout the campaign. She will help you develop an effective communications strategy, analyze past results, provide an orientation to your committee, supply educational and promotional materials (brochures, posters, campaign video, Web page links, logos, pledge cards, speakers or agency tours and other educational resources) and act as a sounding board for your ideas.

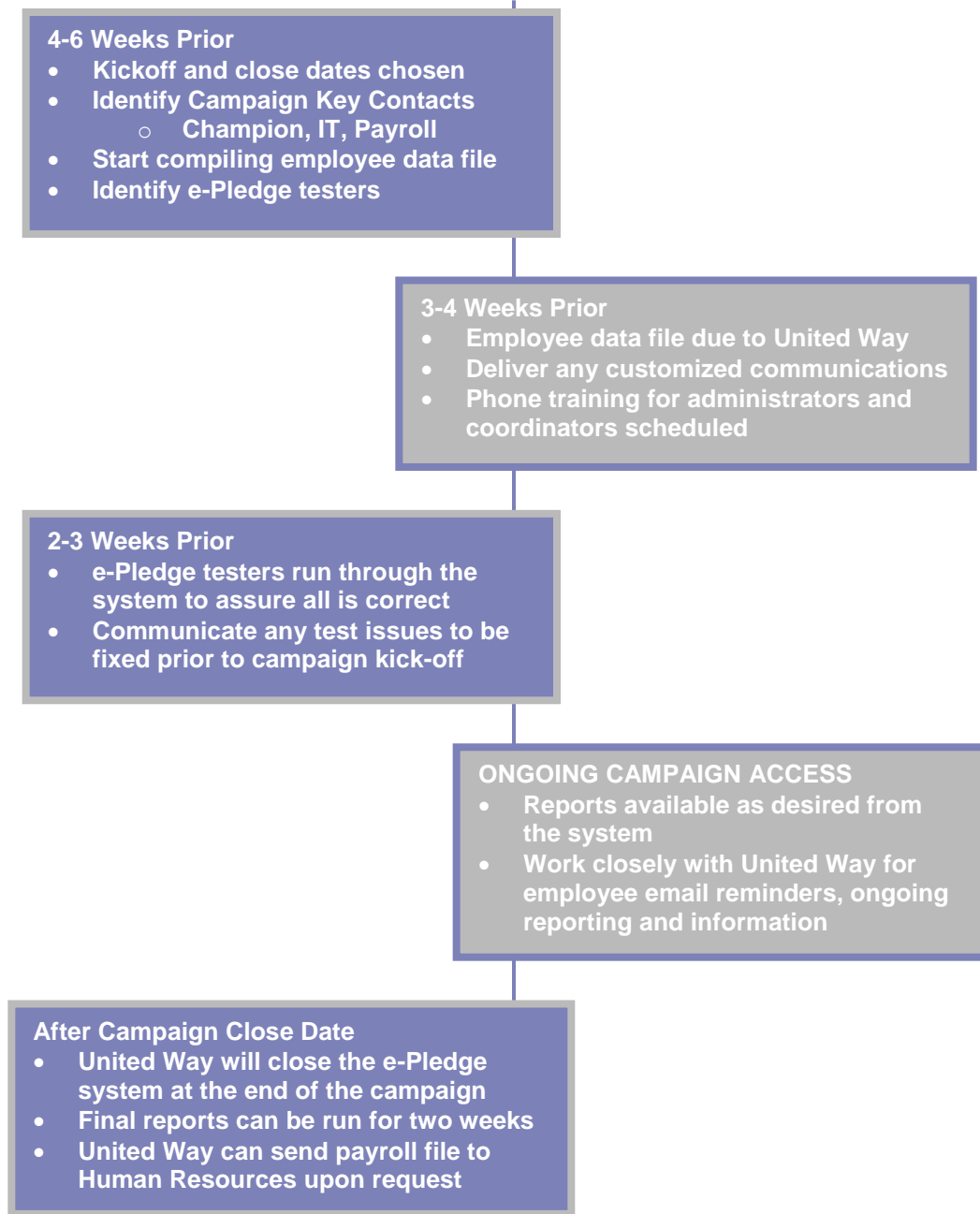
Susie Bibler
614.436.UWAY (8929)
sbibler@uwaydelaware.org

United Way of Delaware County
614.436.UWAY (8929)
LiveUnitedDelawareCounty.org

Location: 8999 Gemini Parkway, Suite 100
Columbus, OH 43240

Mailing Address: P.O. Box 319
Delaware, Ohio 43015

e-Pledge Timeline (if needed, can be streamlined)



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Our Commitment to Your Successful Campaign

Following are samples that will help guide your preparation for the upcoming campaign and use of e-Pledge.

Kickoff E-mail

Subject: Online e-Pledging from United Way of Delaware County

Welcome to online e-Pledging from United Way of Delaware County!

Starting today, **Day, Month/Date**, through **Day, Month/Date** online pledging will be available for **Organization's Name**. [Click Here](#) to be logged in automatically. You will be prompted to change your Password upon entering the site. If you wish to go back to the site after changing your Password, please use this address: <https://epledge.uwaydelaware.org> with the User ID of: **UserID**.

If you have any questions or problems, please call us at 614-436-8929.

Thank you for your support of this year's campaign!

Sample CEO E-mail

Subject: A Message from **Name of CEO/President**

Dear **First Name**:

Do you believe you can make a difference in someone's life? I do. By each of us contributing to United Way through payroll deduction, we make a powerful impact on our neighbors in need.

If you have not already done so, I ask you to join with me and make your pledge to support our community through **Company Name's** e-pledge campaign.

Who does your gift impact? Thousands of people throughout Delaware County...like Cameron.

Cameron was eight when he was matched with his Big Brother Richer. For more than 5 years, Richer has served as a mentor to Cameron. Without the daily influence of a father in the house, Cameron was in need of a positive male role model. Richer spends quality time with Cameron every week, playing games, going out to eat, watching movies. Now, Cameron is a teen-age boy and Richer finds that the two most important things he can provide Cameron are listening and being there. Richer is humble when asked what kind of an impact he has made on Cameron's life. But Cameron's mom says Richer will likely never know what a huge difference his mentoring has made on her son's life. Big Brothers Big Sisters is in the business of saving children – one little brother at a time.

Thank you in advance for your contribution.

Sincerely,

CEO/President of Company

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If you have any questions or problems, please call the United Way of Delaware County office at 614-436-8929.

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Reminder E-mail

Subject: Reminder.....online Pledging ends in a month!

Online pledging is still available until **Day, Month/Date**.

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Thank you for your support of this year's campaign!

Closing E-mail

Subject: LAST DAY TO MAKE AN ONLINE PLEDGE

Believe You Can Make a Difference in Someone's Life

"Ron and Linda have three children – a set of twins who are four and a little boy who just turned three. One of the twins has been diagnosed with Autism and the young girl also has a speech delay. Their life is hectic with special needs classes, therapies, and jobs. In partnership with The Delaware Speech and Hearing Center, Liberty Community Center is the only childcare center in Delaware that is able to provide the very specialized care needed for this family."

You ARE the Difference – Please consider contributing toward your community's future, today through United Way of Delaware County.

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Data File Layout

Following is the layout for the employee data file. This represents the information we need on file to set up your e-Pledge account.

Field Name	Max Length	Description
PREFIX	Character(15)	Prefix (Mr., Ms., etc.)
*FIRSTNAME	Character(15)	First name
*MIDDLENAME	Character(15)	Middle name
*LASTNAME	Character(25)	Last name
SUFFIX	Character(20)	Suffix
EMPLOYEE ID NUMBER	Integer	Unique Identifier (NO SSN please!)
SORTFIELD1	Character(15)	Used to Sort your online reports
SORTFIELD2	Character(15)	Used to Sort your online reports
SORTFIELD3	Character(15)	Used to Sort your online reports
SORTFIELD4	Character(15)	Used to Sort your online reports
SORTFIELD5	Character(15)	Used to Sort your online reports
*NBRPAYPERIODS	Integer	Number of pay periods for this employee
ADDRESSLINE1	Character(40)	Home Address line 1
ADDRESSLINE2	Character(40)	Home Address line 2
CITY	Character(25)	Home City
STATEORPROV	Character(2)	Home State/Province
ZIPPOSTALCODE	Character(10)	Home Zip code
*E-MAILADDRESS	Character(70)	Unique Work E-mail address

* - required field

- Data in the columns is case sensitive
- Any fields listed that you need us to return in the payroll file MUST be included on original employee data file.
- Any information (ex. department, business unit, etc.) that you would like to use to sort or filter your reports MUST be included on original employee file in SORT FIELD 1 to SORT FIELD 5.

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e-Pledge Report Options

Below you will find a list of reports that are available in the e-Pledge system. Please note, reports are submitted to the system and are executed in the order they were submitted. The time it takes you to receive a report depends on the number of reports that have been requested. If there is any delay because of other reports that are running, your report will show as pending until the request can be completed. All reports are accessed under the “My Outputs” menu.

Cash Report

This report will list all cash or check transactions from the employees of your company. You can choose whether or not to show the transaction amounts, you can also choose the transaction source and many other options.

Response Report

This report will show all employees who have responded in the campaign. Please be aware that this includes not only employees who have pledged, but also anyone who selected the *No Gift* transaction type. You can choose whether or not to include pledge amounts.

No Response Report

This report will show all employees who have not responded at all. These are employees who have yet to make a pledge or enter their choice not to give this year. Typically, these would be employees that coordinators might want to follow up with.

Summary Report

This report will display the total pledge amounts, the number of givers, participation %, Average Gift, Per Capita, \$ change and % change between the previous campaign year and the current campaign year.

Transaction Report

This report provides all transaction details including pledge and payment amount and designations for employees.

Frequently Asked Questions

Q: Will there be a minimum bill-me amount?

A: There is a \$50 minimum for donors requesting home billing.

Q: Will there be a maximum number of designations?

A: e-Pledge allows a maximum of 12 designations per pledge. If a donor wishes to designate to more than 12 agencies, they should contact the United Way.

Q: Will there be a minimum designation dollar amount?

A: There is a \$50 minimum per designation.

Q: Will a donor have the ability to enter multiple pledges?

A: As long as your campaign is still open each donor will have the opportunity to pledge as many times as desired through e-Pledge. Once the campaign is closed, please contact the United Way office for any additional pledges or changes.

Q: How are paper pledge forms entered?

A: The system has the ability to allow company coordinators to enter paper pledge forms during the campaign; however, if there is a substantial amount of paper pledge forms we highly recommend you forward those to United Way for input.

Q: How are pledge forms/monies collected and sent to United Way?

A: Company coordinators should collect the pledge forms and monies from their assigned employees and turn them in to the Workplace Champions who will make arrangements with the United Way Campaign Director for speedy transfer of materials.

Q: What should we do if donors have trouble accessing the site?

A: In the event of technical difficulties, please contact Gail Gregory at 614.436.8929 or ggregory@uwaydelaware.org. She will work to resolve any issues in a timely manner.

Q: What are the United Way's policies regarding donor information and privacy issues?

A: United Way of Delaware County retains information provided by users in a secure database. We will never sell, trade, or share your information without your prior consent. We do not retain bank or credit card information in our system. For online security, we maintain a 128-bit encrypted SSL digital certificate through Thawte.

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Q: Will donors receive e-Mail communications from the United Way during/following the campaign?

A: The e-mail addresses received by UWDC are strictly confidential and used only for the following purposes:

- 1) To send automated e-mails directly from e-Pledge including User ID & Password, Password Changed, e-Mail Changed, Confirmation of pledge, and any customized messages that may be needed
- 2) To send bi-monthly UWDC e-newsletters ONLY upon request

Q: What e-Mail address will be used for these communications from e-Pledge?

A: epledge@liveuniteddelawarecounty.org (please ensure that this domain is added to your trusted senders list)

Q: What about employees hired after we send you the data file? Can they use e-pledge?

A: A new employee can be easily set up for e-Pledge at any time. Simply send the name, employee ID, e-Mail address and all other pertinent information to your e-Pledge Manager. The new employee will be set up and the personalized link will be sent.

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