

## What is ePledge?

ePledge is United Way of Portage County's online pledging platform, an easy and convenient way for your employees to invest in the community.

### Features:

- Simple and accessible way for employees to donate
- Customized messaging for your company
- Automated email communications throughout your campaign
- Multiple giving options, including payroll deduction, credit card and billable gifts
- Secure and confidential
- Optional kiosk or generic login for employees with no email access
- Reduce the need for paper pledge forms and manual reporting
- Easily monitor campaign progress in real-time
- Download payroll reports and other helpful monitoring reports
- Special events can be run through ePledge with credit card payments
- No transaction or administrative fees

### FAQs:

- Is ePledge secure?
  - Yes, pledge data is stored in a password protected database using Andar Software. United Way of Portage County (UWPC) is PCI compliant and utilizes Clover Connect for credit card and ACH transactions.
- Will our information be shared?
  - No, UWPC does not sell or share any information.
- What are the fees for using ePledge?
  - UWPC does not charge administrative fees for ePledge usage. Donors are not charged transaction fees for payment processing.
- What is the donor experience on ePledge?
  - During a standard ePledge campaign, automated emails are sent from UWPC's system directly to your employees. Messages can be customized with a message from your CEO or campaign team and include a personalized, encrypted link for the donors to access ePledge.
- Can we still utilize paper pledge forms for employees who prefer to use them?
  - Yes, paper pledge forms can either be entered by campaign coordinators on the e-admin portal or submitted to UWPC for entry. Once entered, the paper pledges will be included in campaign monitoring reports.
- What if our employees do not have email or computer access?
  - We recommend setting up a kiosk in a general area, such as a break room. All you need to provide is a laptop/tablet and we will create instructions for employees to access the site and self-register.
- How do we monitor our campaign?
  - Campaign coordinators or other company contacts can be given e-admin authority to view the e-admin portal on ePledge. There they can view an overview of the campaign status, download reports, and manage employee pledges.
- What types of reports are available?
  - Reports include a payroll report, full transaction report, response reports, and a special events tracking report.
- Our organization has multiple sites. Can we still use ePledge?
  - Yes, employees can be sorted by site. Please allow UWPC more time for set up.
- How do special events work on ePledge?
  - Contact UWPC with the details of your special event (dates, theme, ticket prices, etc.) and we will provide you with a link for a customized special events page. Employees will be able to pay via credit card and will receive an email confirmation of their purchase. Special event participation can be monitored by campaign coordinators on the e-admin portal.
  - Please note:
    - Online raffles are prohibited in the state of Wisconsin.
    - Special event payments do not apply to an employee's campaign donation, sweepstakes entry, or coupon book eligibility.
- This is our first year using ePledge. How do we introduce it to our employees?

- It is important to remember that ePledge should not take the place of your regular campaign activities. Keep your employees active and engaged with campaign meetings and special events. Make sure to highlight ePledge as a new feature to process their pledges and remind them to check their emails for the invitation to access the site.
- Who do we contact if we need technical support?
  - Contact [ann@unitedwaypoco.org](mailto:ann@unitedwaypoco.org) or [epledge@unitedwaypoco.org](mailto:epledge@unitedwaypoco.org) if you need assistance.

## *ePledge Prep and Timeline*

### **Preparation: At least 4 weeks to campaign (Prep time will be longer for multiple locations)**

- Provide UWPC with campaign details
  - Kick-off and end dates
  - Names of key contacts involved in running the ePledge campaign at your organization – we will send them an ePledge questionnaire which will provide us all the details needed to set-up your campaign
  - Confirm sign-on method (via personalized email invite or kiosk/self-registration)

### **Site Set-Up: At least 2-3 weeks to campaign**

- Provide the following to UWPC:
  - Send UWPC a data file containing employee information
    - Employee name (First and Last)
    - Employee email
    - Location/department (if applicable)
  - Site customization requests
  - Customized email text (for kick-off, reminder(s), and confirmation messages)
  - Email dates for kick-off and reminders
  - Names and email addresses of employees that will be involved in testing the system prior to campaign kick-off

### **Testing & Training: At least 1-2 weeks to campaign**

- UWPC will send a test email to the desired contacts at your organization. Any issues that arise during the testing phase will be addressed and corrected.
- Proof email and website messaging for accuracy
- Test pledging process and website functions
- UWPC will review the e-admin portal with your campaign coordinator(s)

### **During the Campaign:**

- Run company campaign meetings and special events
- On kick-off date, UWPC will send out the personalized invite email
- Campaign coordinators can monitor the campaign via the e-admin portal
- Paper pledge forms may be entered online by campaign coordinators or submitted to UWPC for entry
- Reminder emails can be sent to non-respondents

### **After the Campaign:**

- Submit remaining paper pledge forms and cash/check payments to UWPC
- Download the payroll report from the e-admin portal – contact UWPC if any assistance is needed