# Virtual Fundraising with ePledge

Do most of your employees have a work email and access to the internet? Are you looking to collect pledges online? United Way's ePledge might be for you. It's quick, easy, and paperless!

ePledge is an online giving portal that allows you to easily collect employee pledges efficiently and securely. United Way builds and manages the portal, saving time and energy for you and your company.

Features include:
- Site personalization for your company and employees
- Web and mobile friendly
- Multiple giving methods – payroll deduction, credit/debit card, bill later, and one-time gifts with cash and checks.
- Real-time ability to track campaign progress, and drill down by department or location.
- Downloadable CSV and PDF reports
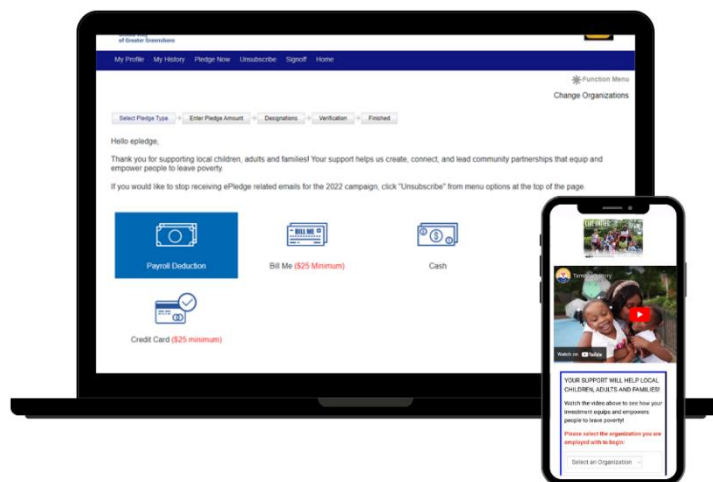
Benefits to Companies
- It's efficient: No more distributing pledge forms.
- It increases accuracy – all information is entered by the donor.
- It's secure – your employees' data is encrypted and stored behind a firewall.
- It's environmentally friendly - Reduces the use of paper pledge forms.
- It's free! While running and maintaining any website has costs, there is no cost to your company to use ePledge. If you are interested in helping underwrite the cost of your ePledge site, let us know!

Benefits to Employees
- It's easy and convenient:
  - Simply update profile, select giving method, enter pledge amount, and submit!
  - Remote workers can participate in the campaign.
- It's secure and confidential - pledges are submitted directly into United Way of Greater Greensboro's database.
- Donors view their giving history on a personalized webpage and manage their own information.
- Automated gift confirmation will immediately be e-mailed to the donor.

Interested in using ePledge? Next Steps:
- Contact your United Way representative to share your interest and schedule a demo at least two months or more before you want to kick-off your campaign.
- Submit the necessary information to United Way.
- Work with your HR and IT departments to plan your ePledge campaign.
- Schedule your employee meetings, events and kick off your campaign!

Questions? Contact the Associate Vice President of Development, Julia Thomas at Julia.Thomas@unitedwaygso.org

ePLEDGE FREQUENTLY ASKED QUESTIONS

<u>**Employer FAQs**</u>

How does it work? What do the screens look like?
Simply review/update your profile, select giving method, enter pledge amount, and submit!
For screen shots, review our How to Pledge tutorial [here](#). For a full demonstration of ePledge, view [this video](#) and/or contact your account representative for a live demo.

You or a company representative will also have access to our eAdministration screen, which allows you to view your campaign's overall status in real time, look up individuals to confirm a pledge was made, resend ePledge emails, and run and download CSV and PDF reports.

Is the United Way ePledge system secure?
YES. While no system is impenetrable, our system is designed for maximum protection of employees' transactions.
- Employee files and payroll deduction files can be sent to United Way using an encrypted server. Data is transferred via a "secure session" established with Secure Sockets Layer (SSL) 128-bit encryption technology.
- Our servers are located on a secure computer and are behind an internet firewall.
- Employees sign in and pledge as themselves.
- Banking information and card numbers are not stored in United Way's database - Credit/debit card transactions are handled by Clover Connect, a PCI compliant third-party processor.

Does United Way need our employees' information before the start of the campaign?
No. While it is preferred and maximizes an efficient log-in experience for your employees, an employee file is not required. Employees will create their own accounts before pledging. If you do not provide an employee file, your platform and employee access options are limited.

If you do share an employee file, we offer several options for secure methods of file transfer. You will need to provide an excel file with the following information: First and Last name, Employee ID#, pay frequency and e-mail address as well as optional information such as home address, phone number, or data to aid in campaign tracking such as department or division. We pre-load this information into our database so employees can easily log in.

Is there a non-disclosure/confidentiality agreement?
We are happy to sign a non-disclosure/confidentiality agreement between United Way and your company to use the information strictly for the ePledge campaign.

What if we have employees who don't have email addresses or easy access to the website?
To access ePledge, employees must have an email address and access to a computer or mobile device. If neither of those are available, employees must use the paper form.

How do employees access ePledge?
There are four options available:

Generic Link - A generic link to UWGG's ePledge Shared platform is shared by the Employee Campaign Manager (ECM) with employees. The employee selects their employer from

the drop-down menu. They enter their email address. If the company shares an employee file, the system will find them and prompt them to verify their identity. If an employee file was not shared, and employee is not in Andar, the system will prompt them to create an account.

Generic emails sent by UWGG – An employee file required. UWGG sends out 3 generic emails – kick off, reminder and final reminder – during the campaign window. These emails are not customizable. UWGG sends these emails to all employees based on a schedule determined by the ECM. The email contains the recipient's unique donation link. The employee should not forward share this link with others. The link securely and automatically logs into that user's personalized ePledge page tied to their personal account in Andar. Employees will continue to receive emails until they pledge or unsubscribe from the email list. This unsubscribe remains only for that campaign year.

Personal URL (PURL) Link with Username and Password (also known as Self Registration) – An employee file required. File will either include a username and password or the system prompt user to create own password. UWGG provides a PURL link for the company to share with employees.

Single Sign On (SSO) - An employee file required. User logs in at employer's typical access point, such as an intranet, and access personal ePledge page without re-entering authentication factors. This is preferred for companies with very strong firewall settings where emails will not go through. There is IT set-up needed from both the company and United Way. If a company requests SSO, 14 business days will be added to the ePledge set-up timeline.

Are there fees for using ePledge?
There are fees that United Way incurs for your use of the platform. If you are interested in helping to cover these fees, please let us know. There is a website design cost and a transaction fee.

Is there a minimum number of employees to use this platform?
There is not a minimum number of employees, but due to the costs mentioned above, there is a minimum investment level depending on the platform you use.

How long can we run our campaign?
Best practice recommends campaigns run for two weeks and wrap up by Thanksgiving. However, if you choose to run longer or during a different timeframe, that is also acceptable.

Can we keep the giving portal open year-round?
Yes. Your payroll office and United Way would need to make the decision together.

Can we use ePledge if we have multiple locations or a national campaign?
Yes. However, there are multiple items the United Way of Greater Greensboro must review before determining if we will process your campaign in that manner. Please reach out to your account representative for more information.

Does using ePledge mean my campaign can go completely digital?
While technically true, ePledge is an electronic tool to allow donors to make a pledge or donate, it does not replace campaign activities such as internal communications, CEO support, leadership meetings, special events and campaign presentations. These campaign activities are still critical in running a successful United Way workplace campaign.

What email will the link be sent to?
It will be sent to your employee email address.

How long will the portal be open for me?
This depends on the duration of your company's campaign.

Will I receive a confirmation email?
Yes, unless you check the box to not receive it.

Why didn't I get my confirmation email?
You might have unselected the box to receive it or didn't submit your pledge! Re-enter the pledge portal. If you see the main pledge screen, navigate to the confirmation screen to click the Submit button. If you see a page that says you have a pledge on record, click the Resend Confirmation button.

Can I go in and amend my pledge after I submit?
Yes, if your campaign is still running and your ECM has enabled this feature.

Can I access the link on all screens, including cell phones?
Yes, ePledge is mobile friendly and responsive.

Does ePledge require a minimum gift?
There is no minimum for payroll pledges, cash, or check gifts. The minimum for Bill Me and Credit Card is $25.00. The minimum to designate is $100.00.

Will my private information be shared?
No. United Way does not share or sell any personal information.