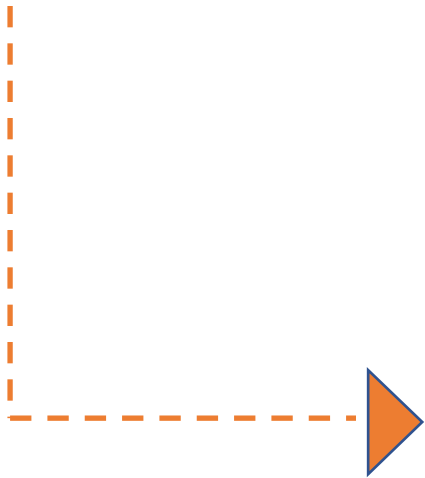




# ePLEDGE TOOLKIT



Tips and tools for effectively using ePledge for your United Way of Warren County campaign



United Way  
of Warren County



# United Way of Warren County ePledge

## Simplify Your Workplace Campaign

United Way of Warren County's ePledge is an online giving and donor management tool that makes running a campaign faster, easier, more cost effective and efficient. By using the ePledge system, you can significantly reduce campaign related expenses, without diminishing your campaigns momentum and success.

### Key features of ePledge are:

- Fast, secure real time data
- Customizable for your organization
- Campaign reports available in spreadsheet or adobe format
- Donors can update and manage their own personal information
- Instantaneous recognition and receipt of gift made by donor

### Benefits of ePledge:

- User friendly (easy to track who has given and who has not given)
- Environmentally friendly (no more paper pledge forms or envelopes)
- Reduces administrative burdens to company
- Increases accuracy of donor information by eliminating errors due to handwriting interpretation and keying mistakes
- Increases confidentiality of donor information
- Decreases employees' perception of coercion
- Multiple reports available to summarize donor support
- Social distancing – virtual campaign

Please provide the following items to United Way of Warren County at least thirty (30) days prior to your kick-off:

1. The start and end date of your campaign.
2. A complete list of all employees and their email addresses in an Excel spreadsheet or .CSV file. Everyone must have access to email and be required to check it on a regular basis.
3. Organizational approval for electronic communications from United Way of Warren County to be allowed through security settings.
4. Your company or organization logo in JPEG form (500 x 378 pixels)
5. Number of pay periods: For example, is it 12, 24, 26 or 52?
6. Name of ePledge Administrator and email address.

If you have any questions, comments or concerns, please call your United Way of Warren County staff person:  
Tricia Huxsoll, 513-932-3987, Ext. 104 or [thuxsoll@uwwcoh.org](mailto:thuxsoll@uwwcoh.org)



# Email Message Templates



## Sample Initial emails:

### Example 1:

Our 2021 United Way of Warren County campaign is underway! ([crm/Start.jsp?HR=&HD=">](#)) Click Here To Donate and give, if you choose, through easy payroll deduction where just a little out of your paycheck goes a long way toward helping people in need.

United Way of Warren County funds 38 non-profit programs helping Warren County residents. Along with initiatives that are centered around our goals of Education, Financial Stability and Health. For example, their "Stop Summer Slide" initiative provided nearly 1,500 children, enrolled in a Warren County public preschool or Head Start program, with books and learning packets to take home over the summer the past three years. These are the types of things a successful campaign helps support.

Please donate today and help United Way of Warren County continue their efforts in our community.

Company e-Pledge Coordinator Name

Company Name

### Example 2:

Dear Company Associates,

Today is the official kick off of our 2021 United Way of Warren County Campaign. The campaign will run through (DATE OF CHOICE).

United Way of Warren County focuses on advancing education, financial stability, and health. These are the building blocks of strong communities. We invite you to be part of the change and help make a difference in the lives of thousands of people every year.

You can participate easily with our e-Pledge system. Just ([crm/Start.jsp?HR=&HD=">](#)) Click Here to get started.

Thank you for your consideration.

Please Note: The link above provided is linked directly to you. Therefore, DO NOT FORWARD this email to anyone who needs the link as the pledge will be made in your name.

### Example 3:

Welcome to e-Pledge, United Way of Warren County's easy, online donation site!

United Way of Warren County supports 38 nonprofit programs and initiatives advancing Education, Financial Stability, and Health for Warren County residents. Those receiving funding include Lebanon Food Pantry, Big Brothers Big Sisters of Greater Cincinnati, Abilities First Foundation, and 4C for Children, just to name a few. The "Stop Summer Slide" initiative provides currently enrolled preschool children with books and learning packets to take home over the summer break. Annually, this ongoing initiative has provided summer materials for nearly 1,500 preschoolers throughout the county.

With your choice to LIVE UNITED, we can continue to provide services to our local community members. Thank you for your continued support.

The link below will take you to your personalized donation page. This link is customized to you. Please DO NOT forward this email to anyone else.

\*\*\*Please respond even if you do not wish to donate to prevent future emails\*\*\*

crm/Start.jsp?HR=&HD=" title="ePledge Site " style="color: #008000;">CLICK HERE TO DONATE NOW!

If you have questions regarding your campaign or payroll pledge contact Company e-Pledge Coordinator at PHONE NUMBER or EMAIL

If you are having technical issues with this email or the pledge process, please contact Tricia Huxsoll 513.932.3987 x104 or by email at [thuxsoll@uwwcoh.org](mailto:thuxsoll@uwwcoh.org).

### Sample 2nd emails:

#### Example 1:

Good Afternoon Company Employees,

This is just a friendly reminder that our 2021 United Way campaign is well underway. If you have not had a chance to make your donation yet, please click on the link below and do so at your earliest convenience. Warren County is a better place when we all LIVE UNITED!

The link below will take you to your personalized donation page. This link is customized to you. Please DO NOT forward this email to anyone else.

crm/Start.jsp?HR=&HD=" title="epledge site" style="font-size: 14pt;">CLICK HERE TO DONATE!

\*\*If you do not wish to donate, please enter site and choose; "I do not wish to donate" to prevent future emails\*\*

### Example 2:

Our 2021 United Way of Warren County Campaign is well on its way! Last year our (COMPANY) campaign improved by (INSERT #)% to \$(INSERT #) and our participation rate improved by (INSERT #)%. Let's keep that momentum rolling! [Begin.jsp?HR=&HD=">CLICK HERE to participate.](#) United Way of Warren County funds nearly 38 non-profit programs helping Warren County residents. For example, their "Stop Summer Slide" initiative provided every child enrolled in a Warren County preschool with books and learning packets to take home over the summer the past three years, and they've done the same for the over 1,000 preschoolers in every other district in the county. These are the types of things a successful campaign helps support. It will only take a few minutes to give! Just a few dollars per pay goes a long way! Just [Begin\(.jsp?HR=&HD=" style="color: #0000ff;">\) CLICK HERE to get started.](#) Thank you!

Please Note: The link above is provided for your convenience in pledging--and linked to your name and user ID; therefore, DO NOT FORWARD this email to anyone who needs the link as the pledge will be made in your name.

### Example 3:

Dear Company Associates,

We are going strong with our 2021 United Way of Warren County campaign and we are off to a great start. The campaign will run through (INSERT DATE).

United Way of Warren County Partner Agencies focus on advancing education, financial stability, and health. These are the building blocks of strong communities. We invite you to be part of the change and help make a difference in the lives of thousands of people.

You can participate easily with our e-Pledge system. Just [Begin\(.jsp?HR=&HD=">\) click here to get started.](#)

Thank you for your consideration.

Please Note: The link above is provided for your convenience in pledging--and linked to your name and user ID; therefore, DO NOT FORWARD this email to anyone who needs the link as the pledge will be made in your name.

### Sample 3<sup>rd</sup>/Final email:

#### Example 1:

Good Morning!

This is a final reminder that our 2021 United Way of Warren County campaign ends today! It's not too late to get your pledges in!

It only takes a few minutes to give through easy payroll deduction. Just a few dollars per pay goes a long way! Just (crm/Start.jsp?HR=&HD=" title="epledge">) CLICK HERE to get started.

#### Example 2:

Dear Company Staff,

The 2021 United Way of Warren County campaign officially closes at the end of the day on (INSERT DATE). Don't miss your chance!

Just Begin.(jsp?HR=&HD=">) click here to get started.

Thank you for your consideration.

United Way of Warren County

Please Note: The link above is provided for your convenience in pledging--and linked to your name and user ID; therefore, DO NOT FORWARD this email to anyone who needs the link as the pledge will be made in your name.

#### Example 3:

It's the final week of our 2021 United Way of Warren County campaign! Last year our (INSERT SCHOOL DISTRICT) campaign improved by (INSERT #)% to \$(INSERT#) and our participation rate improved by (INSERT #)% from (INSERT #) to (INSERT #) donors. Let's keep that momentum rolling! Begin.jsp?HR=&HD=">CLICK HERE to participate. United Way of Warren County funds 38 non-profit programs helping Warren County residents. For example, their "Stop Summer Slide" initiative provided every child enrolled in our district preschool with books and learning packets to take home over the summer the past three years, and they've done the same for the over 1,000 preschoolers in every other district in the county. These are the types of things a successful campaign helps support. It will only take a few minutes to give through easy payroll deduction. Just a few dollars per pay goes a long way. Just Begin.(jsp?HR=&HD=">) CLICK HERE to get started. Thank you!

Please Note: The link above is provided for your convenience in pledging--and linked to your name and user ID; therefore, DO NOT FORWARD this email to anyone who needs the **link as the pledge will be made in your name.**



# Frequently Asked Questions



## **IS ePLEDGE SECURE?**

Using the employee list provided to United Way of Warren County, a unique user ID and embedded password is created specifically for each employee and sent in an email directly to the employee.

## **WHAT IF WE HAVE EMPLOYEES WHO DON'T HAVE EMAIL ADDRESSES?**

We suggest you offer both ePledge and traditional paper pledge forms to employees. United Way of Warren County will enter the paper pledge forms into your ePledge campaign. Ask your United Way of Warren County Campaign Account Manager for a report envelope. Enclose your pledge forms and complete the front of the envelope. Contact your UWWC Campaign Account Manager at 513-932-3987 to pick it up.

## **IS THERE A MINIMUM NUMBER OF EMPLOYEES REQUIRED TO USE ePLEDGE?**

No. We can accommodate your company no matter how big or small.

## **DOES ePLEDGE REQUIRE A MINIMUM GIFT?**

A minimum gift amount can be determined by the company based on pledge type. ePledge has a default payroll amount of \$1.00 per pay period. Pledge type by credit card has a default of \$25.00.

## **ARE THERE FEES FOR USING ePLEDGE?**

No. The service is provided to you free of charge by United Way of Warren County. UWWC has invested in this campaign technology to upgrade the donor experience, to meet the expectations of donors, and adapt to the fast-paced work environment.

## **WHAT IF SOMEONE LOSES OR DELETES THEIR LINK?**

Someone who loses or deletes their link or has difficulty signing on should contact the United Way of Warren County ePledge administrator, at 513-932-3987, Ext. 104 or [thuxsoll@uwwcoh.org](mailto:thuxsoll@uwwcoh.org) for immediate assistance.

## **WHAT IF AN EMPLOYEE WANTS TO CHANGE THEIR PLEDGE?**

Ask them to contact the United Way of Warren County ePledge administrator, at 513-932-3987, Ext. 104 or [thuxsoll@uwwcoh.org](mailto:thuxsoll@uwwcoh.org).

## **CAN I ENTER SPECIAL EVENTS OR CORPORATE GIFTS IN ePLEDGE?**

No. ePledge is a portal for employee donations only. Instead, put these gifts, including any paper pledge forms, in a traditional report envelope. Call your United Way of Warren County Campaign Account Manager at 513-932-3987 to get a report envelope. Complete the front of the envelope and contact your Campaign Account Manager when it's ready to be picked up.

**WHEN DO I GET MY PAYROLL FILE?**

When the company campaign is complete, contact the United Way of Warren County ePledge administrator, at 513-932-3987, Ext. 104 or [thuxsoll@uwwcoh.org](mailto:thuxsoll@uwwcoh.org), to turn off your ePledge campaign. At that time, the UWWC ePledge Administrator can run the transaction report listing only payroll pledges for your payroll department.

**THIS IS OUR FIRST YEAR TO USE ePLEDGE. WHAT ARE THE BEST WAYS TO PROMOTE THIS CHANGE TO OUR EMPLOYEES?**

It is important that you inform your employees that you are using ePledge. Take time at your employee campaign meetings to highlight the ePledge giving portal and explain what they can expect and how to use it.

**HAVE A QUESTION THAT YOU DON'T SEE HERE?**

Contact your United Way of Warren County Campaign Account Manager at 513-932-3987.

# Suggested Timeline



The length of your campaign and the ePledge options chosen may require an adjusted timeline.

## KEY CAMPAIGN DATES

Campaign Kickoff Date: \_\_\_\_\_ Campaign End Date: \_\_\_\_\_

## TIMELINE

STEP	TIMELINE	YOUR TARGET DATE
Complete your ePledge form	8 weeks before campaign kickoff	
Submit your employee and company data	8 weeks before campaign kickoff	
Review proof of ePledge site and submit any needed changes	6 weeks before campaign kickoff	
Submit customized messages	4 weeks before campaign kickoff	
Review final proof of ePledge site	4 weeks before campaign kickoff	
Test ePledge site	4 weeks before campaign kickoff	
Submit data for any new employees	1 week before campaign kickoff	

### Kickoff your campaign!

*Below is a suggested timeline for sending emails. You may decide if these emails are sent, when they are sent and how many are sent. Reminder emails are only sent to non-respondents.*

Send announcement email with link to portal	Day of kickoff	
Send first reminder email	3-4 days after kickoff	
Send second reminder email	3 days before the end of your campaign	
Send final reminder email	Day of end of your campaign	
Finalize your campaign	Contact the United Way ePledge administrator and request to turn off your ePledge campaign	

**OFFICE**

645 Oak Street • Lebanon, OH 45036 • (513) 932-3987

[www.uwwcoh.org](http://www.uwwcoh.org)

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United Way of Warren County Ohio

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