

Guide for Online Campaigns



Online giving is offered to all workplaces. Some workplaces are centrally coordinated campaigns (and use platforms like @work or salesforce), others use third-party processors (like Benevity). Local campaigns use ePledge through United Way KFL&A (UW).

ePledge through United Way KFL&A allows employees to pledge online, eliminating the need to distribute, collect, and process paper pledge forms. This secure online interface allows communication directly to employees, and provides real-time pledge tracking.

ePledge is easy to use, and **support is provided by UW staff throughout your campaign.**

Benefits of an online campaign:

- Online giving eliminates the need for paper pledge forms
- Protects accuracy and confidentiality of donor information
- Donors are able to view previous giving and to update their information and submit their donation directly
- Follow-up easily with colleagues via email and only those who have not yet responded will receive the reminder (i.e. you won't be bothering those who have already made a choice)
- Donations are processed automatically
 - Receipts for one time gifts through credit card, e-transfer, and PayPal are emailed to the donor immediately
 - Receipts for monthly giving (credit cards or pre-authorized payment options) are issued at the end of the year in which these deductions occur
 - Payroll deduction amounts will be included in a payroll report generated for Human Resources to import directly into the payroll system
- Donors will have the option to designate to an area of service or Canadian registered charity, if they wish, through the donor choice option
- ePledge administrators can generate a report of all employee gifts for incentive draws and status updates with one click
- It is easy to set-up reminder communications to those who have not yet given or to set up pre-campaign options for those who have given previously

Easy Steps to Set-up:

1. **Identify your team members** to UW (staff partner or database@unitedwaykfla.ca)
 - Determine who needs to have access to how much detailed information
 - **IT contact** is identified from your IT department in case of technical issues and to proactively add emails to your "allowlist" from ePledge (adding @unitedwaykfla.ca as a safe sender)
 - **Payroll contact** will receive reports with details of payroll deduction

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- **ePledge administrator** rights are given to those in your organization who can have full access to all donor information. In some workplaces, this includes the Employee Campaign Chair; however in other workplaces this is restricted to HR or payroll due to privacy policies within the workplace
- **Coordinators** can pull reports for total amounts (potentially by department or type) but do not see detailed donor information

Tip: it is helpful to connect UW with your IT colleagues to add @unitedwayfla.ca as a safe sender and ensure internet access for employees

2. Employee information to be uploaded

- Provide basic employee information in Excel to your UW staff partner including name, work email address, and employee ID or other identifier (for your Payroll Department)
- This will be uploaded by your payroll administrator, HR, or ePledge administrator through a safe secure process

Employee ID	First Name	Last Name	Gender (if available for salutation)	Department (if available)	# Pay Periods Annually	Email Address
12907	John	Doe	M	Human Resources	26	john_doe@company.com

3. Plan and timelines for launch, reminders, and wrap up

- Work with your UW staff partner and committee to set up communications and reminders (we make this easy with templates)
- Plan for
 - Pre-canvass for donors, Leaders of the Way
 - Campaign launch messaging
 - Reminder(s)
 - Targeted reminders and follow up for those who have not responded
 - Determine who the email should appear to come from, and who should be the contact person in case your colleagues have questions
- Your UW staff partner will work with you to strategize the most effective way to follow up, and will assist with personalized messaging and follow ups

4. Training and orientation

- ePledge training for canvassers and ePledge administrators is provided by UW

Access and Login:

UW will send an email to your organization's employees on the day of your campaign launch (you may want a pre-canvass email to go to Leaders of the Way and/or previous donors), with a personalized link containing embedded login information. When

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employees click the link, it recognizes who they are and directs them through a secure interface.

Your colleagues can then view the options to give, and be able to select their preferred payment type and format (e.g. credit card, payroll, paypal). This year, in order to provide contact-less options, UW has introduced e-transfer in lieu of cheques/cash.

Tips:

- It is important to remind your colleagues not to forward this link to anyone as it is personalized for each employee
- If an employee doesn't recall getting an email, the link can be resent, either by UW or by your ePledge administrator
- UW can also set up a special custom site for your workplace. In the event they forget or lose the email, employees can login through this site using their work email address
- Consider how best to contact **retirees** to offer the online option as well. A special link can be created by UW to capture their donations. Any donations through this will be credited to your campaign

Administrator Access:

An ePledge administrator has 2 menus available (all other employees have just one):

1. ePledge Administrator Menu
2. Workplace Donor Menu

ePledge Administrators can switch back and forth between the two menus by clicking either "Donor" or "ePledge Administrator" at the top-right of the screen.

Tip: as ePledge administrator, you may receive pledge forms directly. You can forward these to United Way (either scan or hard copy.. not both) or you can enter the pledge yourself. See option in chart below. If you enter the pledge yourself, please do not forward the form to UW to avoid duplication.

1. ePledge Administrator Menu

The ePledge Administrator Menu allows you several options to manage and monitor your workplace campaign:

- Campaign Status: allows you to track the status of your workplace campaign, including: totals; goals; number of employees; number of donors; participation rate; average gift
- Email: allows you to send a personalized email to your employees
- Reports: allows you to run campaign reports through a variety of options for viewing your campaign data. Simply select the report you would like and click "Submit". Your report will appear under "Outputs"

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REPORTS

- Employee List with Department**
Default parameters
- No Response Report**
Lists all employees who have not responded.
- Payroll deduction report**
Lists all payroll deduction pledges.
- Pledge Response Report - with giving type**
All donors at workplace with giving type.

- **Transactions:** allows you to search by employee in order to review their transaction details. Once you search for the employee you are looking for, you have the following options:

	Allows you to enter a new pledge for the employee. This might happen if you have an employee who does not have email access.
	The envelope in the first column allows you to resend the login email to the employee, including the employee's user id and password encrypted.
	The second envelope further down the bar allows you to resend the confirmation email to an employee who has already made a gift.
	The delete symbol allows you to delete a pledge that an employee has made. Once the gift has been processed at the UW office this option will no longer be available and you will need to contact our Finance Department to make changes.
	The edit sign allows you to update an employee pledge. Once the gift has been processed at the UW office however, this option will no longer be available and you will need to contact our Finance Department to make changes.

- **Documents:** allows you to securely upload employee information directly and securely to your UW
- **Setup:** allows you to upload a logo for your organization if not previously given, or to update the current one on file
- **Sign out:** logs you out of the system, ensuring that employee information is securely locked and accessible only by re-entering your user id and password

2. Workplace Donor Menu

This menu allows you to manage your personal information and view campaign history.

- **Donate:** review last year's giving history (if applicable), and begin the pledge process allowing donors to select their pledging preferences

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- Campaign Status: allows employees to view the campaign thermometer (if applicable)
- My Profile: includes options to update personal information and set preferences for communications
- History: provides donors with their giving history for the previous 5 years. New donors to the system will not have this option available
- Sign Out: logs out of the ePledge system

Tax Receipting

What is Receiptable?

- Direct cash, cheque and credit card donations of \$20 or more are automatically issued a tax receipt
- Direct cash, cheque and credit card donations are receiptable for the tax year in which they are received
- Monthly donations will be receipted at the end of the calendar year. Payroll deductions will appear in box 46 on T4 slips



How to Handle Special Events

Collect money and submit to UW via eTransfer rather than cheques or cash.

Online auction payments should also be submitted via eTransfer or EFT. A workplace may choose to borrow UW's credit/debit machine. Contact finance@unitedwaykfla.ca to arrange for this machine or ask your UW staff partner.

If any donations at an event qualify for receipts, you or the donors can enter each transaction online as you would any other donation and the donor will automatically receive a receipt.

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Frequently Asked Questions

Q: If an employee wants to use a paper pledge form for a one time donation or payroll deduction, are they able to?

A: Yes, UW can provide editable pdf document or hard copy forms. You can enter the pledge as outlined above or arrange for pickup or drop off to UW office. For details on how to drop off, visit www.unitedwaykfla.ca/contact.

Q: Can workplace still collect cash with paper pledge forms if they are ok with this internally and send in a cheque to United Way? If yes, are we able to scan them over a digital copy so they can print and distribute to their employees OR drop some forms off?

A: UW continues to receive cash and cheques. You can also choose to use eTransfer or EFT options.

Q: Are employees able to see their giving history through e-pledge if they haven't donated online before but have donated via cash, cheque etc.?

A: If we're able to match the employees e-Pledge account to their previous giving history (usually this happens by matching their email address), they will be able to view their previous giving history in e-Pledge. However, this may not be the case if we didn't previously have the employee's email address, or we have a different one on file.

Q: For the workplaces that still want to keep track of their funds raised, can they still have a thermometer on their e-pledge site?

A: Yes, this will show in the Campaign Status tab. We can enable this for any workplace that wants to display it. We can also adjust the thermometer to display metrics such as % participation or # of donors.

Q: Will the new thermometer with the giving hearts be able to translate onto their e-pledge homepage?

A: We have the ability to add the Giving Hearts thermometer to e-Pledge, however unlike the regular thermometer it will not automatically update as pledges come in. This will need to be done manually with images showing progression of the campaign; and so would be updated on a periodic basis (e.g. increments of 10%).

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