

2021 ePledge Guide

Local Love in action



United Way
Kingston, Frontenac,
Lennox and Addington

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UW KFLA Missions, Vision, Values

Mission

To build and strengthen our community by bringing people and resources together to facilitate change.

Vision

We see a future where people are self-sufficient in a community where individuals live with hope, dignity and a sense of belonging.

Values

We will be known as an organization that:

- Operates with integrity, transparency and accountability to the highest ethical standards to ensure public trust
- Provides leadership in driving social change, partnerships and collaborative innovation
- Respects community wisdom by considering diverse viewpoints
- Harnesses and engages the talents and resources in our community to enhance a philanthropic culture
- Promotes volunteerism through creating awareness and engagement

What is United Way?

United Way is:

Local: United Way raises funds locally and invests locally. United Way provides expertise about local issues and brings people together to help the most vulnerable and tackle the most pressing social challenges.

Accountable: United Way is accountable – to donors and partners in the community. Accountability and transparency are key values of United Way and our website reflects this, making its annual report, financial statements, allocations and grants available and accessible. United Way KFL&A is trusted in the community and is proud to be recognized by Charity Intelligence on their top 100 Rated Charities list.

Meeting immediate needs: The United Way focuses on the most vulnerable members of our community, funding programs in local agencies through grants. United Way works with local agencies to understand and address immediate needs as they arise.

Collaboratively addressing root causes: The United Way brings the community together to work collaboratively across sectors to address root causes of issues like youth homelessness, poverty, and food access. The United Way's focus is on prevention, long-term impact and addressing the root cause of local issues.

ePledge Overview

ePledge offers a secure online portal that supports your existing United Way workplace campaign. This portal allows employees to pledge online, eliminating the need to distribute, collect, and process paper pledge forms. It also allows you to view the status of your campaign in real-time.

United Way's online giving portal is easy to use, and support and assistance is provided by the United Way staff team.

Benefits:

- Eliminates the need for paper pledge forms, saving time, paper and the environment
- User-friendly experience for donors and administrators
- Increases efficiency of campaign administration
- Live campaign updates and reporting (no need to add up pledge forms)
- Customized messaging for your workplace

Requirements:

- Employee information provided to United Way KFLA prior to campaign kick-off
 - First name, last name, email, and employee ID (if applicable)
- Internet access for employees

Traditional ePledge Campaigns vs Self Registration Campaigns

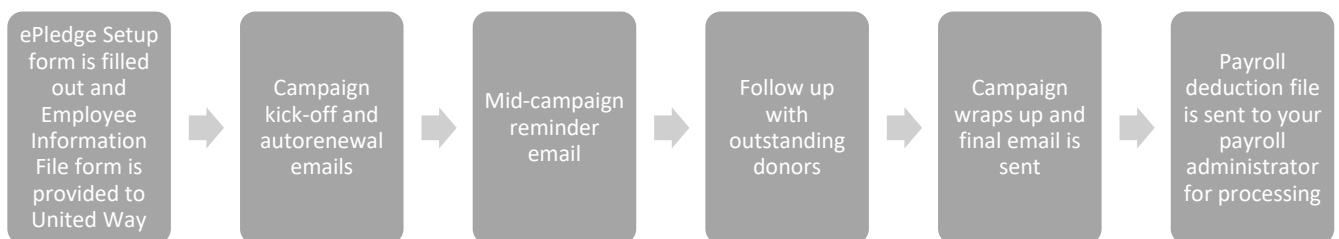
Traditional

In a traditional ePledge campaign, United Way KFLA is provided with employee information in the weeks prior to the campaign kick-off. This allows for customized emails with a donation link to be sent to donors on the campaign kick-off date, as well as follow-up emails throughout and after the campaign. It also enables workplace administrators to track metrics such as workplace participation with accuracy and in real time.

Self-Registration

If you are unable to provide us with employee information, you may opt for a Self-Registration campaign. We will provide you with a link to a registration page for your workplace that can be forwarded to employees at your organization. After creating an account on this page, employees can log in to ePledge to set up their donation.

ePledge Campaign Timeline



Prior to the campaign, you will receive a link to a brief online form that will ask for basic information about your workplace campaign, contact information of your IT and Payroll Administrators, and your Employee Information file (see the “Employee Information File” section for more details)

Once you provide us with you Employee Information file, we will use this file to create accounts for each employee in our database system.

On the date of your campaign kick-off, through the United Way database, each employee will get a customized link to log in to ePledge and set up their donation.

OPTION: The email can be designed to appear to be sent by you (or an alternative workplace contact) and you can opt to receive all responses or have them go to United Way to be forwarded to you.

- If you are using the self-registration option, you will send a mass email to all employees with a link to the self registration page.

Prior to this or on the same date, auto-renewal donors (see the “Autorenewal Donors” section for more details) will be sent a similar email, informing them that their donation has been renewed and providing instructions on how to change their gift.

TIP: it has been found that sending a pre-campaign email to Leaders of the Way (those who give \$1200 or more) and/or to all donors is an effective way to build momentum for your campaign

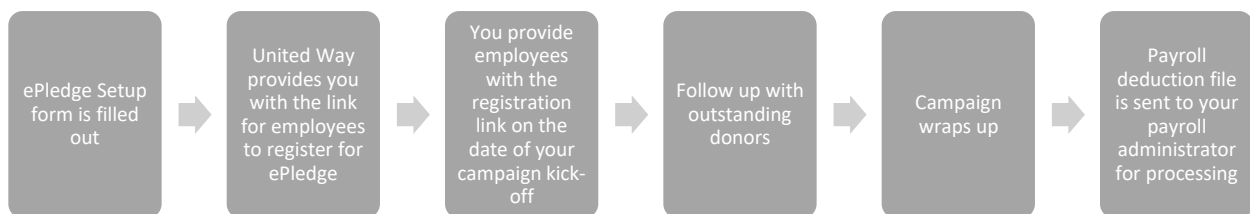
Halfway through the campaign, on a pre-determined date, non-respondents will receive a mid-campaign reminder email from United Way, with another customized link to log in. Non-Respondent donors are employees who have not donated or indicated that they would not like to donate this year.

Following this reminder email, we will work with you to identify outstanding donors for customized and personal follow-up.

At the end of the campaign, we will send a campaign “wrap-up” email to thank donors and allow for any final donations.

In December, we will provide the payroll administrator at your workplace with a list of payroll donors that you can use to set up their donations in your payroll system.

Self-Registration Campaigns



If your workplace is unable to transmit an employee information file to United Way, you may choose to opt for a self-registration ePledge campaign. The primary difference between a traditional ePledge

campaign and a self-registration campaign is that employees in a self-registration campaign sign up for ePledge themselves.

We will provide you with a generic link that anyone at your workplace can use to register for ePledge. After entering in their basic information (including name, work email address, and other contact information if they wish to provide it), employees can log onto ePledge and proceed with their donation.

In a self-registration campaign, United Way does not possess a list of employees at your organization in our database. This means that mass communications, such as the campaign kick-off email, are restricted only to employees who donated in the previous year's campaign.

Autorenewal Donors

Autorenewal donors are donors who, in a previous campaign, requested that we automatically renew their donation in the following campaign.

At the beginning of your workplace campaign, all autorenewal donors will be sent an email informing them that their previous year's pledge has been renewed.

The email contains a link to a form that can be used by the donor to inform us if they wish to cancel or adjust their autorenewed donation. We request that donors inform us of these changes within 10 days of receiving the email.

ePledge Setup Form

The ePledge Setup form allows you to provide us with key information that we will use to setup your ePledge campaign. You will be provided with a link to the form prior to the campaign.



E-PLEDGE SETUP

Online giving 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.

United Way's online giving portal "e-Pledge" is easy to use, and assistance is provided by a United Way staff member throughout your campaign.

Basic Information

* Name of your organization:

* Employee Campaign Chair (ECC) Name:

ECC Phone Number:

The form will request the following information:

- Contact information of your:
 - Employee Campaign Coordinator(s)
 - ePledge Contact (if different than your Employee Campaign Coordinator)
 - Payroll Administrator
 - IT Contact

- Your preferred campaign dates
 - Kick-off date
 - Mid-campaign reminder email date
 - Campaign end date
- Your Employee Information file
- Your organization’s logo
- How much you hope to raise

Employee Information File

In order for United Way to send personalized emails to each employee and allow them to log into ePledge, we require their basic information in your Employee Information File:

- First name
- Last name
- Work email address
- Employee ID (if used at your organization)
- # of Pay Periods

Please send this information in an Excel spreadsheet, in either .xlsx or .csv format.

Example:

First Name	Last Name	Work Email	Employee ID	# of Pay Periods
John	DiPaolo	jdipaolo@unitedwaykfla.ca	123456	26

Employee IDs are used to distinguish between donors who may have the same name or email address. We also include this ID in reports transmitted back to you to allow for easier importing into your HR and Payroll systems.

Although not required, any other employee data would allow for greater analysis during and after your campaign. For example, providing us with data on what department each employee is from would allow for the analysis of your campaign on a department-by-department basis.

As per our [Privacy Policy](#), this information is stored safely and securely, and is only used for the purpose of the campaign. United Way respects and works within the requirements of your organization’s internal policies on access and use of employee personal information.

Emails

At various points in a traditional ePledge campaign, employees will receive emails with a customized donation link to log in to ePledge and set up their donation. Examples of the emails sent in the 2020 campaign are below:

Campaign Kick-off

Local Love

in action



workplace

2020 United Way Campaign

Dear Nishan,

The United Way works to build and strengthen our community.

Last year, over 59,000 people were helped locally through 71 programs in Kingston and the surrounding areas. And in the first four months of the pandemic, over 42,000 people have received support for basic and immediate needs. This critical work continues, and is more important than ever, through the COVID-19 pandemic.

I know that many of you are looking for ways to help in these challenging times. By participating in our Workplace Campaign, you are helping the community. United Way works closely with agencies and programs to continue meeting immediate needs and helping the most vulnerable.

ePledge provides a fast, convenient way to submit your pledge to the United Way. Take a look around the secure site to learn more information about how your funds are used.

Please, if you can, consider giving through this campaign – your local love can continue to impact local lives.

[Donate](#)

Thank you,

Your 2020 ***workplace*** Campaign Committee

Email to Autorenewal Donors



workplace

2020 United Way Campaign

Dear Nishan,

The United Way helps people at the most vulnerable moments of their lives.

By participating in our Workplace Campaign, you are helping over 59,320 people in our communities. The United Way provides funding for 71 programs in Kingston and the surrounding areas.

Thank you for your support of United Way. You are receiving this e-mail because you have selected to auto-renew your donation.

Please note that your donation will automatically be renewed by our system and will continue until you advise us otherwise. [If you wish to make changes to your 2020 donation, please click the button below.](#)

United Way KFL&A is excited to announce the Leadership Challenge Grant will continue this year, thanks to a generous donor. Donors who increase their donations to \$1,200 will see their donation matched and donors who are already Leaders of the Way (donations of \$1,200 or more), and add at least 10% to their gift will also see their increase matched.

[Change Your Gift](#)

Thank you,

Your 2020 ***workplace*** Campaign Committee

Mid-Campaign Reminder



*****workplace*****

2020 United Way Campaign

Dear Nishan,

The United Way works to build and strengthen our community.

By donating to the United Way, you are helping more than 59,000 people in our communities through 71 programs in the KFL&A area.

We're off to a great start for our 2020 Workplace Campaign and there's still time to give. We need your help to reach our campaign goal!

Your support will enable United Way to address the increased demands on services and help people, including all those impacted by the pandemic. United Way is working closely with local partners, frontline agencies to tackle immediate needs in these challenging times and, with your help, will continue to help those that need help the most.

ePledge provides a fast, convenient way to submit your pledge to the United Way. Please donate and together we can show our local love.

Donate

Thank you,

Your 2020 *****workplace***** Campaign Committee

If you would like to customize any of the content in these emails, please inform United Way at least a week before the email is scheduled to be sent.

Donation Link

The donation link provided to employees is unique to each individual employee. This link should not be shared.

Respondents vs. Non-Respondents

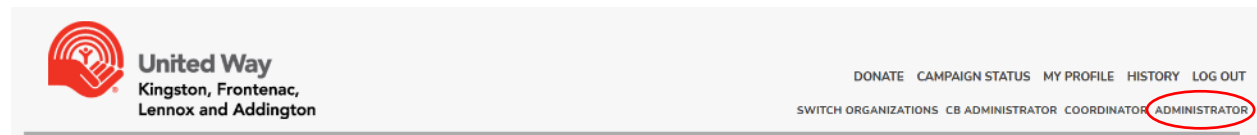
When an employee logs into ePledge and sets up a donation, this would mark them in our system as a Respondent. Individuals who select the “I do not wish to pledge this year” option on ePledge are also marked as Respondents.



When sending follow-up communications to employees (such as the mid-campaign reminder email), our system allows us to omit Respondents from the mailing list. For this reason, it is recommended that even if they do not wish to donate, employees should still log into ePledge and select that they do not wish to pledge. This would opt them out of future communications.

Administrator Access

An individual with the “ePledge Administrator” role in Andar has access to a variety of campaign information directly through ePledge. Individuals with administrator access can switch to the ePledge Administrator portal by clicking the Administrator button on the top-righthand corner of the screen.

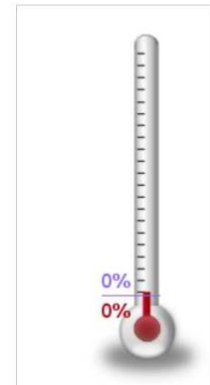


Campaign Summary

The campaign summary screen allows you to view up-to-date information on your campaign, including the campaign total, the number of donors, participation rates, and more.

CAMPAIGN STATUS

Here is up to date information on how your workplace campaign is progressing.



Name	Campaign Type	Total	Goal	# Emps	# Donors	Participation Rate	# Responses	% Responses	Average Gift	Gift per Capita
Test Workplace	Empl	\$0.00	\$0.00	0	0	0%	0	0%	\$0.00	\$0.00

Reports

The reports feature of ePledge allows you to view detailed reports on your campaigns progress. Each report has a variety of options available that allow you to filter the data, as well as choose whether to download in PDF or Spreadsheet format.

After submitting a report, your data will be available in the “My Outputs” menu.

United Way
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CAMPAIGN STATUS REPORTS TRANSACTIONS DOCUMENTS LOG OUT
SWITCH ORGANIZATIONS DONOR CB ADMINISTRATOR COORDINATOR

MY OUTPUTS

In order to download a report right click the link and save the report on your computer.

Refresh

Show Outstanding

<input type="checkbox"/>	Job Number	Job	Names	Date	#Pages	Size	Type	Status	Description
<input type="checkbox"/>	493360	Response Report	Test Workplace - Pledge Response Report	05/26/2021 10:45:12 AM	1	4.7 KB	pdf	Ready	

Response

The Response Report will list all employees at your organization who have responded. This includes all donors, and individuals who have selected “I do not wish to give” on ePledge.

No Response

The Response Report will list all employees at your organization who have not responded.

Summary One

This report will display a summary of the campaign, including the total campaign amount, number of donors, and more. You may choose to change the Year of the report to view a summary of a previous year.

Transaction Report

This report lists all donations for the given year.

Transactions

The Transactions menu allows you to search for transactions made by employees at your organization.

After searching for an employee, any donations made by that individual in the given year will be listed. By selecting the options to the left of their name, you can choose to add a pledge on their behalf, send them an email, or update their employee information.

TRANSACTIONS LIST

TEST WORKPLACE - COMPANY

open all
close all

- Test Workplace
 - test subsidiary

Campaign Year

Search for employee Q

Add

	Name	Pledge	Payment	Pledge Type	Payment Type	Received	e-Payment Verification
\$	e Pledge, Test	N/R	\$0.00				

Documents

The Documents menu can be used to securely upload documents for United Way to access. It can also be used for you to access documents that we upload, such as your payroll deduction file at the end of the campaign.

ADD DOCUMENT

Test Workplace

Description

File Name No file chosen
Click and paste here.

Effective

Expiry

Add

Coordinator Access

ePledge Coordinators are able to view high-level information on the campaign rather than individual donor data. Coordinators have access to the Campaign Summary menu, the Summary report, and the Documents menu in the same capacity as ePledge Administrators.

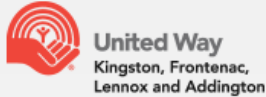
Special Events

Funds for special events can be transmitted to United Way through the following page:

<http://andarweb.unitedwayfla.ca/specialevents>

Payments can be made on this page through Credit Card, Paypal, and eTransfer.

You will be asked to provide your contact information, the name of your workplace, and a description of the event. Once processed, these funds will be recorded as Special Events donations in your workplace campaign.



United Way KFLA - Special Events

Please use this page to transmit special events donations on behalf of your workplace. If you encounter any technical difficulties, please contact database@unitedwaykfla.ca.

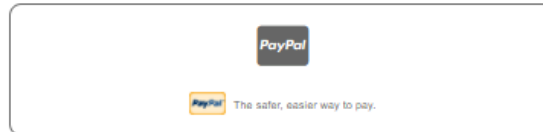
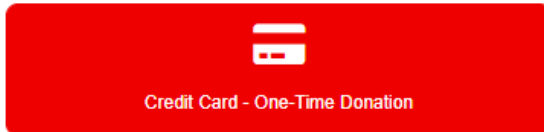
* Individual Work Email

* Name of your workplace:

* Description of Event:

Items marked with an asterisk(*) are required

Please select your payment type:









Donor Experience

Once employees log into ePledge, they will be taken directly to the ePledge donation page.

From here, they can select their donation type: Payroll Deduction, Credit Card, e-Transfer, Paypal, or Securities. They can also indicate that they do not wish to give this year.



PLEASE SELECT YOUR DONATION TYPE

 Payroll Deduction	 Credit Card	 e-Transfer	 Paypal Express Checkout
 Securities	 I choose not to give this year.		





After selecting their pledge type, the donor can enter how much they wish to donate.

Deduction Start Date:	<input type="text" value="Jan. 01, 2022"/>
Deduction Per Pay:	<input type="text" value="\$4.62"/>
Pay Periods Per Year:	<input type="text" value="26"/>
Number Of Deductions To Make:	<input type="text" value="26"/>
Total Annual Pledge:	<input checked="" type="radio" value="\$120"/> <input type="radio" value="\$240"/> <input type="radio" value="\$360"/> <input type="radio" value="\$500"/> <input type="radio" value="\$1200"/> <input type="radio" value="Other"/>
	<input type="text" value="120.00"/>

Designations


The Designations section allows donors to designate their gift to one or more registered Canadian charities, or a United Way KFLA impact area.

UNITED WAY KFLA IMPACT AREAS

Name	Designation Amount
United Way COVID-19 Response Fund	<input type="text"/>
 Building Strong and Healthy Communities	<input type="text"/>
Food Security	<input type="text"/>
 Helping Kids Be All They Can Be	<input type="text"/>
 Moving People From Poverty to Possibility	<input type="text"/>
 Youth Homelessness	<input type="text"/>

REGISTERED CANADIAN CHARITIES

Keyword

Donors can search through our database to find the charity that they wish to designate their gift to. After finding the charity they're looking for, selecting the  button will allow them to indicate how much of their gift they would like to designate to that charity. This process can be repeated for multiple designations if desired.

REGISTERED CANADIAN CHARITIES

Keyword

Result: (- of)

Name	Book #
Kingston Humane Society	135235



Result: (- of)

If they do not find the charity they're looking for in our database, donors can use the "Write In" option to provide us with information on the charity that they are designating their gift to.

ADD WRITE-IN

Amount	\$40.00
Agency Name	Brant County SPCA
Address	539 Mohawk St
City	Brantford
Province	ON
Postal Code	N3T 5M8
Country	Canada
*Charitable Registration Number Required in order to properly process your designation. To search for registered Canadian Charities visit https://apps.cra-arc.gc.ca/ebci/hacc/srch/pub/dsplyAdvncdSrch	89836 9319 RR0001

Add

A minimum gift of \$20 (per charity) is required for this option, and a 10% processing fee will apply, except on designations to other United Ways.

Designation payments are paid out in installments to charities twice a year, and designated charities are paid only the funds that have been received by United Way KFLA at the time of the payment.

Post Campaign

In early December, an email will be sent to the payroll administrator at your workplace with a link to log in to ePledge and access your workplace's payroll deduction file.

This file lists all employees who pledged via payroll deductions, how much they donated in total, and how much to deduct per pay period. If employee IDs were provided in your Employee Information file, these would be included in the payroll deduction file.

To access the file, the payroll administrator simply needs to click the link in the email to be logged into ePledge. They can then access the Documents menu and download the file for upload into your organization's payroll system.

Frequently Asked Questions

A new employee joined after we sent the employee file, can they still donate online?

Yes. To have an employee registered for ePledge, simply contact database@unitedwaykfla.ca with their name and email address. The employee will be registered for ePledge and sent the link to log in and make their donation.

A donor would like to change or cancel their pledge, how can they do this?

To change a payroll pledge, donors can simply log back into ePledge and they will be given the option to update an pledge amount or cancel their payroll donation.

For all other pledge types, donors can contact database@unitedwaykfla.ca to request a change or cancellation.


An employee lost their username/password, how do I help them log in?

Users who forget their password can navigate to: <https://andarweb.unitedwaykfla.ca/ForgotPassword> and select "Forgot User ID or Password".

After entering their work email address, users will be sent an email with instructions on how to log in and reset their password.

An employee donated online and can't find their confirmation email, what should I do?


Users with ePledge Administrator access can re-send the confirmation email to employees at their organization by using the "Transactions" menu.

After searching for the employee, selecting the envelope button  on the right side of the screen will allow you to re-send the confirmation email to the employee.

You can also choose to contact database@unitedwaykfla.ca with the donor's information. The confirmation email will be re-sent to the donor as soon as possible.

An employee didn't receive a receipt for their donation. Who do I contact to have this sent to them?

Users with ePledge Administrator access can re-send the donation receipt to employees at their organization by using the "Transactions" menu.

After searching for the employee, selecting the receipt button  on the right side of the screen will allow you to re-send the receipt to the employee.

You can also choose to contact database@unitedwaykfla.ca with the donor's information. The receipt will be re-sent to the donor as soon as possible.

Please note that donors who pledge via payroll will not receive a receipt from United Way.

Are employee IDs mandatory in the employee file?

Employee IDs are not mandatory, but highly recommended if they are used at your organization.

Employee IDs are used to distinguish between donors who may have the same name or email address. We also include this ID in reports transmitted back to you to allow for easier importing into your HR and Payroll systems.

What steps do you take to ensure employee data is kept safe and secure?

We are committed to protecting the privacy of all individuals. We maintain appropriate technical and organizational safeguards to protect donor information against loss, theft, unauthorized access, disclosure, copying, use or modification.

Access to your personal information is restricted to UWKFLA employees, agents and authorized service providers who need the information to fulfill the purpose for which the information was collected. UWKFLA will protect your personal information by safeguards that are appropriate to the sensitivity of that information and the format of the information, whether electronic or physical.

Our procedures include physical security measures, organizational measures including security clearances and limiting access on a “need-to-know” basis, and technological measures such as the use of passwords and encryption. When it comes to the handling of electronic records, UWKFLA adheres to Payment Card Industry Data Security Standards (PCI DSS).



Thank You ♥
for your local love

www.unitedwaykfla.ca



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