

# 2022 ePledge Guide

**Local Love** in action



**United Way**  
Kingston, Frontenac,  
Lennox and Addington

# Contents

- ePledge Overview..... 3
  - Benefits ..... 3
  - Requirements ..... 3
  - Traditional ePledge Campaigns vs Self-Registration Campaigns ..... 3
    - Traditional ..... 3
    - Self-Registration ..... 3
- ePledge Campaign Timeline ..... 3
  - 4-6 weeks before kick-off..... 4
  - During your campaign ..... 5
  - Respondents vs. Non-Respondents ..... 5
- Sample emails ..... 6
  - Campaign Kick-off..... 6
  - Email to Autorenewal Donors ..... 7
  - Mid-Campaign Reminder..... 8
- Administrator Access ..... 9
  - Campaign Reporting..... 9
    - Response..... 10
    - No Response ..... 10
    - Summary One..... 10
    - Transaction Report ..... 10
  - Transactions..... 10
  - Documents ..... 11
- Coordinator Access..... 11
- Special Events ..... 12
- Donor Experience ..... 13
  - Designations..... 14
- Post Campaign ..... 15

Frequently Asked Questions ..... 16

- A new employee joined after we sent the employee file, can they still donate online? ..... 16
- A donor would like to change or cancel their pledge, how can they do this? ..... 16
- An employee lost their username/password, how do I help them log in? ..... 16
- An employee donated online and can't find their confirmation email, what should I do? ..... 16
- An employee didn't receive a receipt for their donation. Who do I contact to have this sent to them? ..... 16
- Are employee IDs mandatory in the employee file? ..... 16
- What steps do you take to ensure employee data is kept safe and secure? ..... 17

## ePledge Overview

ePledge makes giving to United Way easy and simple. The secure online 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.

### Benefits

- Eliminates the need for paper pledge forms, saving time, paper, errors and the environment
- User-friendly experience for donors and administrators
- Increases efficiency of campaign administration
- Live campaign updates and reporting
- Ability to send customized emails for your workplace

### Requirements

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

## Traditional ePledge Campaigns vs Self-Registration Campaigns

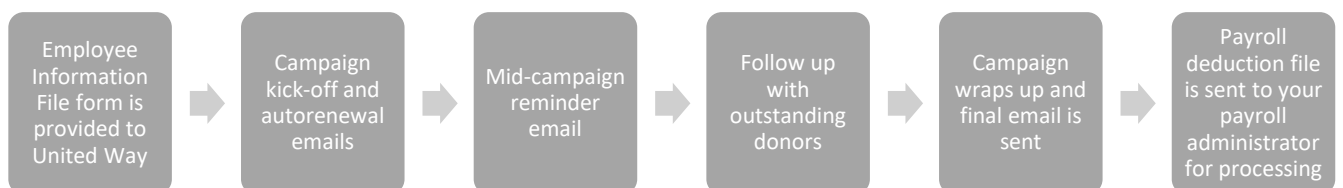
### Traditional

In a traditional ePledge campaign, you provide us with a list of employee names and emails before your campaign kick-off. We use the list to generate customized emails with a donation link for your kick-off, as well as follow-up emails throughout and after the campaign. It also enables you to track metrics such as workplace participation accurately and in real time. **The donation link is unique to each individual employee. This link should not be shared.**

### Self-Registration

If you are unable to provide us with employee information, you can choose Self-Registration. 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, employees can log in to ePledge to make their donation.

## ePledge Campaign Timeline



## 4-6 weeks before kick-off

We'll send you a brief online form asking for

- 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 organization's logo
- How much you hope to raise
- Your Employee Information file in an Excel spreadsheet, in either .xlsx or .csv format.  
The information file should include
  - First name
  - Last name
  - Work email address
  - Employee ID (if used at your organization)
  - # of Pay Periods

Example:

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

Once you provide us with you Employee Information file, we will use this file to create accounts for each employee in our database. 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, you can provide other employee data as well to help with the analysis of your campaign. For example, department data can help you better understand 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.

## During your campaign

We'll send customized emails to your employees throughout the campaign. Here are some common emails workplaces send:

- **Launch email with customized link:** the email can be designed to appear to be sent by you or someone in your workplace. You can choose to receive all responses or have them go to United Way to be forwarded to you. NOTE: If you choose self-registration, you'll send a mass email to all employees with a link to the self-registration page.
- **Auto-renewal email:** custom email sent to donors who have chosen auto-renewal confirming their pledge will renew and how to change or increase their gift. Many workplaces will send auto-renewal emails out a few days before their kick-off date.
- **Leader email:** it has been found that sending a pre-campaign email to Friends (those who give \$500 or more) and Leaders of the Way (\$1,200+) is an effective way to increase \$ and build momentum for your campaign.
- **Reminder emails:** a mid-campaign email reminding employees who haven't responded yet to give. Following this reminder email, we will work with you to identify outstanding donors for customized and personal follow-up.
- **Wrap-up and thank you emails:** Emails to ask for final donations, thank donors, etc.

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.

## 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.

## Sample emails

### Campaign Kick-off



### **[Your Workplace Name] 2022 United Way Campaign**

Dear Nishan,

The United Way works to build and strengthen our community.

Last year, United Way of Kingston, Frontenac, Lennox and Addington helped 74,000 people in the region through 61 and more than 127 programs.

As the effects from the pandemic continue, individuals, friends, and families across KFL&A are going to need help now more than ever. In conversations with agencies, we have learned that some are seeing a thirty percent increase in first time clients – people who have never accessed these services before.

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 2022 United Way Campaign Committee

Email to Autorenewal Donors



**[Workplace Name]**  
**2022 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 74,000 people in our communities. The United Way provides funding for 127 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 on **\*\*\*date\*\*\*** and will continue until you advise us otherwise. **If you wish to make changes to your 2022 donation, please click the button below.**

**Change Your Gift**

Thank you,

Your 2022 United Way Campaign Committee



## Mid-Campaign Reminder



**[WORKPLACE NAME]**  
**2022 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 74,000 people in our communities through 127 programs in the KFL&A area.

We're off to a great start for our 2022 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.

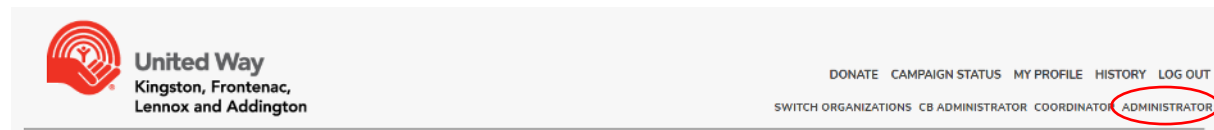
**Donate**

Thank you,  
Your 2022 United Way 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.

## 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.

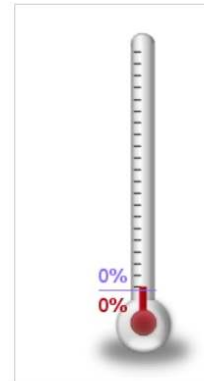


## Campaign Reporting

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

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.

## 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"/>	493368	Response Report	<a href="#">Test Workplace - Pledge Response Report</a>	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

- Test Workplace
  - test subsidiary

Campaign Year

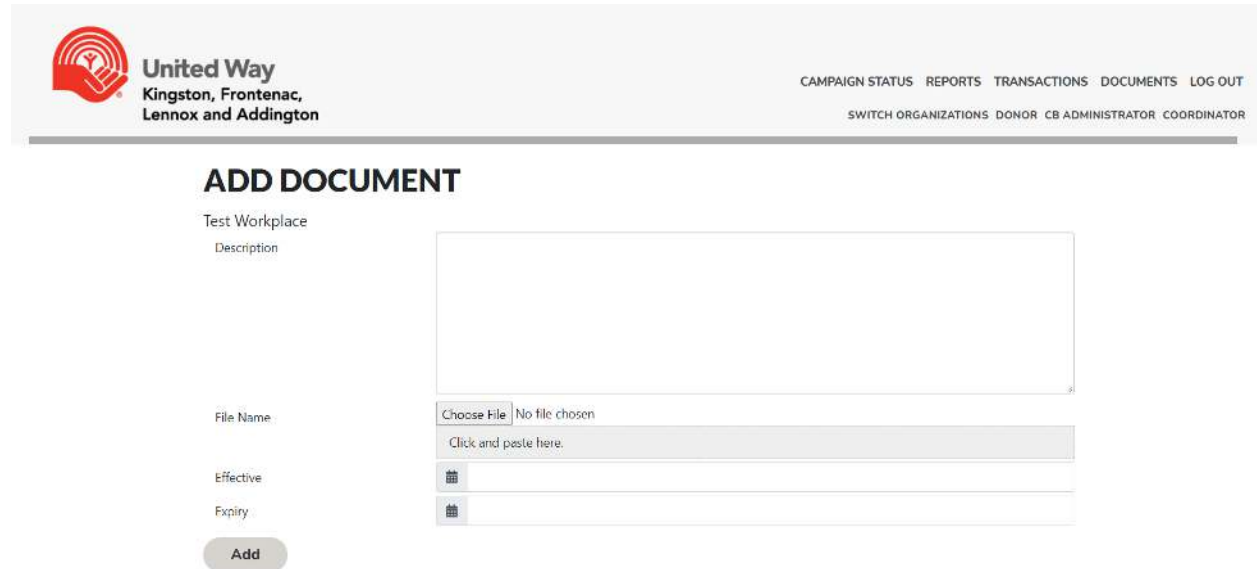
Search for employee

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.



The screenshot shows the 'ADD DOCUMENT' form in the United Way system. The header includes the United Way logo and the text 'United Way Kingston, Frontenac, Lennox and Addington'. Navigation links include 'CAMPAIGN STATUS', 'REPORTS', 'TRANSACTIONS', 'DOCUMENTS', 'LOG OUT', 'SWITCH ORGANIZATIONS', 'DONOR', 'CB ADMINISTRATOR', and 'COORDINATOR'. The form fields are: 'Test Workplace' (text), 'Description' (text area), 'File Name' (file upload button and text input), 'Effective' (calendar icon), and 'Expiry' (calendar icon). An 'Add' button is at the bottom.

## 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 same as ePledge Administrators.

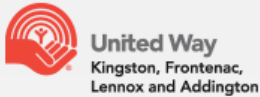
# Special Events

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

<http://andarweb.unitedwaykfla.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](mailto: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:

  
Credit Card - One-Time Donation

  
 The safer, easier way to pay.

## 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.

The screenshot shows the United Way ePledge interface. At the top left is the United Way logo for Kingston, Frontenac, Lennox and Addington. To the right are navigation links: DONATE, CAMPAIGN STATUS, MY PROFILE, HISTORY, LOG OUT, and a sub-menu with CB ADMINISTRATOR, COORDINATOR ADMINISTRATOR, and SWITCH ORGANIZATIONS. Below the header is a section titled 'PLEASE SELECT YOUR DONATION TYPE' with six buttons: Payroll Deduction, Credit Card, e-Transfer, Paypal Express Checkout, Securities, and I choose not to give this year.

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





The screenshot shows the donation form with the following fields and values:

- Deduction Start Date: Jan. 01, 2022
- Deduction Per Pay: \$4.62
- Pay Periods Per Year: 26
- Number Of Deductions To Make: 26
- Total Annual Pledge: \$120 (selected), \$240, \$360, \$500, \$1200, Other
- Below the buttons, a text input field contains the 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 <a href="https://apps.cra-arc.gc.ca/ebci/hacc/srch/pub/dsplyAdvncdSrch">https://apps.cra-arc.gc.ca/ebci/hacc/srch/pub/dsplyAdvncdSrch</a>	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](mailto: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](mailto: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](mailto: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](mailto: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](http://www.unitedwaykfla.ca)



**United Way**  
Kingston, Frontenac,  
Lennox and Addington