

e-Pledge Implementation Guide



United Way
of Greater Chattanooga

What is e-Pledge?

e-Pledge is a secure digital pledge and donation system used by United Way to help company partners, and employees, complete successful annual fundraising campaigns. The entire e-Pledge process takes less than 5 minutes to complete. You will typically do this on your work desktop. e-Pledge also helps employees personally connect with United Way if they choose to do so.

Here are who, and what, make e-Pledge work well:

People – Campaign Managers, United Way Relationship Manager, your Leadership, your employees, and your HR/Payroll team

Processes – Pre-planning, scheduling, employee rosters, campaign content, testing, deployment, monitoring, and conclusion

Tools – Secure internet, e-Pledge software, employee workstations, employee rosters, and your company HR/payroll system

e-Pledge is a system with many years of successful operation. United Way keeps your personal and giving information safe and secure, and does not market this information to others.

How is e-Pledge deployed? Here is a 4-week sample timeline:

Day 1 – You communicate to your United Way Relationship Manager you want to run an e-Pledge Campaign at your workplace.

Day 2 – If you ran an e-Pledge Campaign last year, your Relationship Manager will email you the employee roster worksheet utilized last year. On this worksheet you can add new employees, and remove employees who are no longer with your organization. If this is your first e-Pledge Campaign, your Relationship Manager will email you a blank employee roster worksheet. Your Relationship Manager will also provide you sample emailable Campaign invitation and Thank you letters which your Leadership can use to craft a message to your employees. Or, you can simply use our letters.

Remember...an accurate employee roster worksheet is the most important tool component of a successful e-Pledge Campaign!

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Typical Ask email letter provided by United Way:



Hi [First Name],

Last September, we released a study that showed that nearly 40% of our community was struggling to meet basic needs -- and this was before the Easter Tornadoes and COVID crisis hit. If you are like most Greater Chattanoogaans, you or someone you care about has been affected by the difficulties caused by COVID and the tornadoes as well. And, like the rest of us, you likely want to know how to best direct your time, talent and resources to support our community's future.

For many in our community things were already difficult, and unfortunately, the new normal means that:

- Substantial community change is occurring on a day-by-day basis
- Finding meaningful ways to get involved is even more time-consuming
- It is difficult to know what problems are needing your time and attention
- Volunteering feels more complicated
- It is harder to connect with others around shared community interests and concerns.
- You have a lot to offer, but the pathways on how to help are not always clear.

We could not agree more. We are here to unite problem-solvers and simplify the ways for them to help. Our neighbors are counting on that more now than ever. Just look at a few of the significant results produced by our community of donors and partners within the past year:

- Over 850 adults and children provided with utility, rent and basic needs assistance due to financial struggles from COVID-19.
- Over 19,000 children empowered through early literacy support.
- Over 21,000 households connected to vital community resources like food and housing support.

If you have been looking for a meaningful way to get involved, here's your chance. Your company is currently running their workplace campaign and you can make an impact by pledging with payroll deduction. Join over 10,000 donors who are fueling the efforts that are addressing both the immediate and long-term challenges to our community's future.

By donating today to United Way, you will make a real and widespread impact and help build a stronger Greater Chattanooga both for you and your neighbors. Join a community of givers, volunteers and advocates!

[PLEDGE OR DONATE TODAY](#)

Here's to Living United for our community,

Handwritten signatures of Lesley S. Scarse and Charlie Brock.

Lesley Scarse, CEO, and Charlie Brock, 2020 Campaign Chair
United Way of Greater Chattanooga

P.S. Your workplace campaign is running for a short time only! Click the link above and make your pledge or donation today. Thank you!

#JoinTheFight

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Typical Thank You email letter provided by United Way:



Dear <FIRST NAME>,

Congratulations! You are part of a community that is making Greater Chattanooga a better place for all!

Thank you for your investment of <TOTAL PLEDGE> into Greater Chattanooga. Your caring power fuels on-the-ground efforts that are making a difference, and that gift is amplified with the generosity of over 10,000 donors strong. United, we solve community problems that no one person or organization can alone. Thank you for committing to Live United!

To see your dollars at work, stay up to date on developments in our community and additional ways to get involved, make sure you are subscribed to our email list.

[Click here to access the United Way of Greater Chattanooga home page and subscribe](#)

Once again, thank you for joining a community of givers, advocates and volunteers. We're thrilled to be impacting our community alongside you!

United,

Handwritten signatures of Lesley S. Scaree and Charlie Brock.

Lesley Scaree, CEO, and Charlie Brock, 2020 Campaign Chair
United Way of Greater Chattanooga

P.S. - There are many ways to connect with other people like you through United Way with our giving, volunteer and advocacy groups. Learn more about them at [our website](#).

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Employee Roster Screenshot:

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Sample Timeline (continued)

Days 3-7 – You compile or update your employee roster worksheet, and Leadership invitation message. Detailed instructions are provided, and please list your employee names as they appear in your HR/Payroll system. Quite often Payroll can produce the report, in the format you need, simply by sharing the blank worksheet template with them. Very easy! Email your worksheet back to your Relationship Manager.

Day 8 – Your Relationship Manager will review your employee roster worksheet, and let you know if any modifications or clarifications are needed. If there are none, then these items will be processed at United Way. There is a 3-week lead time to process, set-up, and test your e-Pledge Campaign. During the test phase, you will receive e-Pledge Administrator credentials and test emails from United Way. These test emails have the same appearance as those your employees will receive when your Campaign begins. If you have any network security policies preventing e-Pledge emails from reaching you, your Relationship Manager will contact you for the appropriate next steps for whitelisting our e-Pledge communications.

Day 27 – Your CEO/Leadership emails the Campaign Invitation to your employees

Day 29 - Your e-Pledge Campaign kickoff! This very often coincides with a kickoff employee meeting. The Ask email letter is sent at the scheduled day and time.

e-Pledge and Campaign Administration

There are two levels of Administrative rights you may have. You will coordinate these levels with your Relationship Manager:

- Full administrative access – includes being able to update and create pledges and produce reports, including the final report to HR/Payroll
- Limited access – only allows viewing of Campaign results. A full-rights Administrator or United Way will send the final report to your HR/Payroll office.

You and your Relationship Manager will be able to monitor the success of your Campaign. Your Relationship Manager will help you with any questions or issues you may have.

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Your employees will receive their unique Ask email letter, with a unique link to automatically take them to their personal donation page. These pages are specific to each employee, and cannot be shared with other employees.

For whatever duration you have selected to run your Campaign, you can have all of the fun employee events you like. The e-Pledge process runs right alongside it.

Important Communications

The United Way e-Pledge system typically sends out multiple scheduled communications to your employees, during your Campaign:

- Initial Campaign Ask letter
- Reminder emails
- Final reminder email
- A Thank You message to those who have made a pledge. Also, on this Thank You message are directional buttons directing you to compelling Donor Journey and Volunteerism sites!

You may schedule emails by coordinating this with your Relationship Manager.

Campaign Conclusion

On the Campaign end-date you have planned with your Relationship Manager, you will confirm with them your Campaign has ended. United Way will digitally “close” your Campaign. Within 24 hours you will receive a final report, and after you review it, please share this report with your HR/Payroll team. They will use this report to set up the appropriate payroll deductions for each employee.

Your HR/Payroll team will send collected giving to United Way over the course of the giving year, typically monthly. Please save your employee roster worksheet for use again next year. Also, if you transition your Campaign Manager role to a new person next year, they will benefit greatly by being able to use this worksheet.