



United Way
of Greater Chattanooga

2021 e-Pledge Implementation Guide

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 3 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.



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Typical Invitation/Ask email letter provided by United Way:



Dear [First Name],

According to data released in a recent United Way-sponsored study, nearly 40% of our community members were struggling to meet basic needs -- and we know that this number has only grown due to the crises of 2020. If you are like most Greater Chattanoogaans, you or someone you care about has been affected by the difficulties of the recent past. 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, our new normal means that substantial community change is occurring daily, and help is clearly needed. But it's difficult to know which issues are most pressing or how to get involved.

That's where United Way of Greater Chattanooga comes in. We are here to unite resources and change-makers to harness the caring power of our community. Our neighbors are counting on us now more than ever. When we unite to give, advocate and volunteer, we solve community problems that no one person or organization can alone.

When you invest in United Way of Greater Chattanooga, your dollars go straight back into our community through our data-driven Community Investment strategy, which fuels on-the-ground efforts and solutions that are making a difference in our neighbors' lives. Join us in engaging to make Greater Chattanooga better for all.

[PLEDGE OR DONATE TODAY](#)

United,

Lesley Scarce, CEO, and Dr. Elaine Swafford, 2021 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](#).

#JoinTheFight

630 Market St. Chattanooga, TN 37402 | Phone: (423) 752-0300 | [UnitedWayCHA.org](#)





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Typical Thank You email letter provided by United Way:



Dear <FIRST NAME>,

Thank you for being part of a community that is engaging with one another to make an impact. Because of you, Greater Chattanooga can become a better place for all!

Thank you for your investment of <TOTAL PLEDGE>. Your donation will go directly back into our community through our data-driven Community Investment strategy. The caring power of community fuels on-the-ground efforts that are making a difference in our neighbors' lives. When we unite to give, advocate and volunteer, we solve community problems that no one person or organization can alone. We thank you for committing to Live United!

We hope you will continue to engage with us year-round, because engaging with United Way means engaging with your community. Make sure you are subscribed to our emails - we'll keep you up-to-date on community issues and opportunities to get involved.

[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,

Lesley Scarce, CEO, and Dr. Elaine Swafford, 2021 Campaign Chair
United Way of Greater Chattanooga

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Employee Roster Screenshot:

| 2021 e-Pledge Campaign Employee Worksheet | | | | | | |
|---|---|-----------------|--------------------|------------|-------------|------------------------------|
| United Way of Greater Chattanooga | <i>All information on this worksheet is required to accurately identify individual donors</i> | | | | | |
| Employer Name | Legal First Name | Legal Last Name | Work Email Address | Department | Employee ID | Number of Annual Pay Periods |
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| <i>Please add rows for employees, as needed</i> | | | | | | |



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Required information includes:

- Employer Name
- Legal First Name
- Legal Last Name
- Work Email Address
- Department
- Employee ID
- Number of Pay Periods

This confidential worksheet is the basis for distributing Ask and Thank You email letters to our Corporate Partner employees. We share this with our e-Pledge service provider, which has been executing secure e-Pledge campaigns large and small, for many years.

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 pre-scheduled day and time.



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e-Pledge and Campaign Administration

There are two levels of Administrative rights you may can 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. This feature is helpful when there are multiple Campaign Coordinators who assist the Campaign Administrator.

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.

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 team-building 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 United Way engagement and volunteerism sites!

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



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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 can access a final e-Pledge campaign, and after you review it and confirm its accuracy, please share this report with your HR/Payroll team. They will use this report to set up the appropriate payroll deductions for each employee, typically beginning January 1st of the next calendar year.

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.