



United Way
of Greater Chattanooga

2022 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],

We are calling on our six-county community to come together to help solve the critical challenges in front of us. In Hamilton County alone, almost 50% of children live in households that can't afford basic needs. Last year, our 211 team answered 51,000 calls from neighbors in need. Many of us have been in similar situations and know just how disheartening—and dangerous—life can seem in the face of such challenges.

For 100 years, the United Way of Greater Chattanooga has committed to making sure everyone in our community can access the educational, social, and public health resources they need to make the most of their opportunities. We know from experience that our lives are richer and our communities are stronger when we work together.

Our first century of work is just the beginning. We continue to answer the call of our neighbors in need, to ensure they have food to eat, electricity in their homes, and how to find help in a crisis. We also invest in over 60 local non-profits to ensure that *their* critical work continues to bridge the gaps that separate our community. It bears repeating: *we are stronger together.*

You can help us continue to make these positive changes in our community.

It's up to all of us—you, me, *everyone*—to ensure that our work continues for the next 100 years. When we're UNITED, every dollar makes a meaningful difference.

[PLEDGE OR DONATE TODAY](#)

United,

Lesley Searce, CEO, and Chris McKee, 2022 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 Volunteer and Engagement groups. Learn more about them on [our website](#).

#JoinTheFight

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Typical Reminder/Final email letter provided by United Way:



Hi [First Name],

Don't forget! You can still make a difference.

We are calling on our six-county community to come together to help solve the critical challenges in front of us. In Hamilton County alone, almost 50% of children live in households that can't afford basic needs. Last year, our 211 team answered 51,000 calls from neighbors in need. Many of us have been in similar situations and know just how disheartening—and dangerous—life can seem in the face of such challenges.

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Typical Thank You email letter provided by United Way:



Dear <FIRST NAME>,

THANK YOU! Because of you, the work of the United Way continues to change lives.

Thank you for your investment of <TOTAL PLEDGE>. Your donation directly funds important work in our community. When we unite to give, advocate and volunteer, we solve community problems that no one person or organization can alone.

Want to learn more and stay involved? [Sign up today and we'll keep you up-to-date on community issues and opportunities to get involved.](#)

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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.

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.

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. This feature is helpful when there are multiple Campaign Coordinators who assist the Campaign Administrator.



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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.

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.



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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.