

INVEST. CONNECT. SERVE.



**United Way of Greater Rochester and the
Finger Lakes
2023 ePledge Guide
Updated 1/4/2022**

United Way of Greater Rochester ePledge Guide

Thank you for using United Way of Greater Rochester and the Finger Lakes' ePledge system. This electronic tool is designed to make employee giving quick and easy.

WE'RE HERE TO HELP!

Please contact your relationship manager for any questions about ePledge, campaign materials, fundraising ideas and past reports. Team members from our IT and Finance departments are also available to help with login information, employee pledge questions and more. Contact your relationship manager to be put in touch with a member of the ePledge team.

To see a sample ePledge site, please use the following link and login credentials:

<https://secure.uwrochester.org/epledge/>

User ID: eTest

Password: test23

TABLE OF CONTENTS

Sample Timeline	Page 3
ePledge Walkthrough	Page 4
How to Compile your Employee Data File	Page 7
Frequently Asked Questions	Page 8
Sample communications	Page 10

United Way of Greater Rochester ePledge Guide

SAMPLE TIMELINE

Below is a sample timeline to help you plan your ePledge campaign. Your relationship manager can help you with any of the steps listed below.

4-6 WEEKS BEFORE KICKOFF

- Campaign kickoff and close dates chosen
- Identify campaign key contacts such as Coordinator, IT and Payroll
- Start compiling employee data file (see How to Compile your Employee Date File section of this guide to learn more)
- Identify those who will test your ePledge site

2-3 WEEKS BEFORE KICKOFF

- Employee date file due to United Way
- Send any customized communications to United Way (CEO letter, image, logo, etc.)

A FEW DAYS BEFORE KICKOFF

- Test your ePledge system
- Send any test issues or updates to United Way

DURING CAMPAIGN

- Pull reports from the system to see who has pledge and your total donations
- Reach out to United Way for any support with email reminders through ePledge, reporting and information

AFTER CAMPAIGN

- United Way will close the ePledge system upon your request
- United Way will send a final report for your payroll department to process pledges

United Way of Greater Rochester ePledge Guide

EPLDGE WALKTHROUGH

You can use the sample ePledge site login on page 2 to walk through the site and/or walk through the images and information below. Your relationship manager is always available to walk you through the site and answer any questions you may have.

LOGIN PAGE

Your relationship manager will work with you to determine the login credentials for your employees. Some examples include email address, employee ID number or first initial and last name.

The screenshot shows the login page for the United Way of Greater Rochester ePledge system. At the top left is the United Way logo and the text "United Way of Greater Rochester and the Finger Lakes" followed by "Helping Children, Livestock, Seniors, Adults, Veterans, and Learning, Together." The main heading is "WELCOME" and the instruction is "Please enter your User ID and Password". Below this is a link: "If you are having trouble logging in, please email cpw@uwmgr.org". There are two input fields: "User ID:" and "Password:". Below the fields are two buttons: "LOGIN" and "FORGOT USER ID OR PASSWORD?". At the bottom of the page, there are several accreditation logos: "GUIDESTAR", "CHARITY NAVIGATOR Four Star Charity", "ACCREDITED BUSINESS", and "GREATER ROCHESTER Greater Rochester Chamber of Commerce".

United Way of Greater Rochester ePledge Guide

HOMEPAGE/GREETING

This is the first page your employees will see when they login and can be customized for your organization to include your logo, a welcome message from your CEO with their picture and signature. At this page employees can learn more about United Way or start their pledge by clicking "Give Now."



SELECTING A DONATION TYPE

United Way makes giving easy for your employees. Through ePledge, employees can donate through payroll deduction, credit card, direct debit/electronic check or choose to be billed. More information is also given on this page for those who would like to donate via cash or check, and you can customize this page with the person at your organization who will be in charge of those donations.

Please select your pledge type

For stock transfers, please notify United Way at 242-8025

- Payroll Deduction
- Credit/Debit Card (\$25 suggested minimum)
- Bill Me (\$25 suggested minimum)
- No donation this year

United Way of Greater Rochester ePledge Guide

DONATION AMOUNT

After selecting a donation type, employees will be brought to a page requesting their donation amount. For payroll deductions they will be asked for their donation based on your pay periods or a one-time donation amount. For all other types of payments they will be asked for the total donation amount along with the start date and frequency of their donation.

DONATION INFORMATION

On this page your employees will decide who they would like to help through their donation. They can give a portion of their gift to United Way's Community Fund, a Community Fund focus area or any agency participating in United Way's donor options program.

Please select your pledge type

For stock transfers, please notify United Way at 242-6836

- Payroll Deduction
- Credit/Debit Card (\$25 suggested minimum)
- Bill Me (\$25 suggested minimum)
- No donation this year

Donation Per Pay Period:

Deduction Frequency: 20 Pays

Total Annual Gift: \$0.00

Another Option for Giving - Donor Options Organizations

Please consider giving to United Way's Community Impact Fund to make the greatest impact for local people and our entire community. If you would like to direct all or a portion of your gift to a donor options organization, you may do so below. Donor options information can be found at www.unitywyr.org/donorservices

Step 1: Review the list of eligible organizations here: [Donor Options Database](#)

Step 2: Enter the organization's ID# or keyword in the search field below and click "SEARCH"

Step 3: Select the organization to whom you would like to give and click the plus "+"ADD" to add the organization

Step 4: Enter the amount of your donation you would like to give to this organization in the "Total Annual Amount" box next to the ID#

Step 5: If you would like to donate to multiple organizations, please repeat these steps

Organization Name or Organization ID#

Thank you for your commitment! If you haven't allocated your total donation, the remainder will be invested in United Way's Community Impact Fund to help individuals, families and our community thrive.

United Way of Greater Rochester ePledge Guide

CONTACT INFORMATION AND PREFERENCES

Employees will then enter their contact information and preferences, including leadership giving societies they would like to join (if eligible based on their donation level), union member and retiree status, preferred email, date of birth and combining their gift with their spouse's/partner's gift. The only information required by your employees in this section is their work email address, but we'd love to know more about your employees whenever possible to celebrate their birthdays, invite them to networking events and keep them informed on how their donation is making a difference for our community.

REVIEW AND COMPLETE DONATION

Your employees will be able to review their information, make any updates if needed and complete their donation. They will receive a confirmation email with details about their donation if they've requested that one be sent.

Please check your information below

Please provide your work email address for your confirmation (if requested)

* Email

Please verify your home address so that we can:

- Provide you a tax receipt if you pay by credit card or electronic check
- Confirm your donation selection
- Mail your statement if you asked to be mailed

Address

Line 1

Line 2

City State Zip Code

Items marked with an asterisk (*) are required

Send me an email confirmation

Join a Leadership Giving Network

- Allstate Advanced Leadership Society
- United Labels
- Energy & Utilities Society (gift of \$500 or more for year of commitment)
- United Labels Club
- United Labels
- Topswell Society (gift of \$1,000 or more)

All energy utility societies for 200 or more each year (\$500 for all years and periods are recognized as Leadership United members. Benefits of membership include annual events, networking and volunteer opportunities. Leadership United members may also elect one or more below to join one or more Leadership Giving Networks.

Additional Information (optional)

- I am a union member
- I am retired

Preferred Email (if different from above work email)

Date of birth (mm/dd/yyyy)

Please combine my gift with my spouse's/partner's gift.

Please review the details of your gift before clicking "Submit".

The confirmation page may take a few moments to display. Please click "Submit" only once.

United Way of Greater Rochester ePledge Guide

HOW TO COMPILE YOUR EMPLOYEE DATA FILE

ePledge allows United Way to enter in information about your employees and pay periods in advance to make pledging or donating easy for you your team. Below is information that is required and optional for you to include in your Excel file. Your relationship manger is available to answer any questions about how this file should be set up, and/or about the fields included. Please provide United Way with this file 2-3 weeks before your kickoff so we can get everything ready for your successful campaign.

REQUIRED FIELDS

First Name
Middle Initial
Last Name
Employee ID (if available)
Number of pay periods for each employee
Email Address
Gender
Work Zip Code (if outside of our five counties)
Work City

OPTIONAL FIELDS

Department
Division
Job category
Job title
Worksite location
Building
Home address
Prefix/Suffix

You may provide up to five different optional fields to your file to help you sort your report during your campaign or after your campaign is complete.

FREQUENTLY ASKED QUESTIONS

Do all employees have to pledge through the ePledge site? What if employees don't have an email address or access to the website?

United Way offers many ways for donors to support our community. Your relationship manager can provide paper pledge forms or other ways for your employees to donate online.

How many organizations can employees choose to give to?

Employees can choose up to 3 organizations that they would like to support through ePledge. If your employees would like to support more than three donor choice organizations they can contact donorchoice@unitedwayrocflx.org.

What should I do if donors have trouble accessing the site?

We're here to help! For any technical difficulties, please contact Nia Sargeant at (585) 242-6527 or epledge@unitedwayrocflx.org

What should I do if donors have questions about or would like to change their donation information?

After donating through ePledge, your employees will not be able to log back in to change their pledge. If your employees would like to change their donation amount or the organizations they chose to support they can contact Nia Sargeant at Nia.Sargeant@unitedwayrocflx.org.

What are United Way's policies regarding donor information and privacy issues?

United Way does not rent or sell any information given to us by donors or organizations, and takes the security of this information very seriously. For more information about our privacy policies please visit unitedwayrocflx.org/about-us/policies/.

My employees aren't receiving their confirmations – how can I make sure they get them?

Confirmation emails are sent from epledge@unitedwayrocflx.org. To make sure donors receive these emails please ask your IT department to add this domain to your trusted senders list and spam filter: mail3.uwrochester.org at IP 65.37.77.213.

What about employees hired after we send you the data file? Can they use ePledge?

A new employee can be easily set up for ePledge at any time. Simply send the name, employee ID, email address and all other pertinent information to Nia Sargeant at Nia.Sargeant@unitedwayrocflx.org. The new employee will be set up and the login information will be sent.

United Way of Greater Rochester ePledge Guide

Can I turn in paper pledges after the ePledge site is turned off?

You can continue to collect paper pledge forms after your ePledge campaign is complete and can contact your United Way relationship manager to pick up these donation.

What will happen at the end of my organization's ePledge campaign?

First, we celebrate together! Then United Way will provide you with an excel file your employee's donation amounts and payment types. This file can be used to upload employee pledges into your payroll system. This report will include all donations collected from your organization through any of the ways your employees can donate (ePledge, paper pledge forms, online). Let United Way know the date that your payroll department will need this file to begin process pledges so we can be sure to get it to you in plenty of time. Have questions about your report? Contact Nia Sargeant at Nia.Sargeant@unitedwayrocflx.org or (585) 242-6527 or Selma Miles at (585) 242-6521 or selma.miles@unitedwayrocflx.org.

**United Way of Greater Rochester
ePledge Guide**

SAMPLE LETTERS AND EMAILS

SAMPLE CEO LETTER FOR WELCOME PAGE

For the past two years, our community has faced complex challenges. United Way of Greater Rochester and the Finger Lakes works diligently every day to not only provide immediate relief to families and individuals in crisis situations but also make long-term solutions possible.

United Way's Annual Campaign provides the foundation for this vital work. Donations from committed community members like you combine with gifts from others and help address our community's needs with collaborative, equity-driven, and results-oriented approaches.

Your support strengthens our community by advancing the next generation, sparking equal opportunity, and keeping our region moving forward.

When you support United Way's Community Impact Fund, you are investing in programs focused on Health, Education and Economic Mobility; crisis response initiatives; funds for organizations leading innovative social and cultural change; leadership development programs; volunteer engagement; and many other resources that lift spirits and touch lives.

DOUBLE YOUR DOLLARS - Each new or increased donation to the Community Impact Fund will be matched, dollar-for-dollar up to \$500,000, thanks to the Canandaigua National Bank & Trust 6-County Challenge Grant.

Click "Give Now" to start your pledge, or contact the campaign coordinator listed on this page with questions.

Thank you for making way for good at your workplace with United Way.

[SIGNATURE BLOCK]

**United Way of Greater Rochester
ePledge Guide**

SAMPLE CUSTOMIZABLE CEO LETTER FOR KICKOFF EMAIL

Hello ((FIRST NAME))

For the past two years, our community has faced complex challenges. United Way of Greater Rochester and the Finger Lakes works diligently every day to not only provide immediate relief to families and individuals in crisis situations but also make long-term solutions possible.

United Way's Annual Campaign provides the foundation for this vital work. Donations from committed community members like you combine with gifts from others and help address our community's needs with collaborative, equity-driven, and results-oriented approaches.

Your support strengthens our community by advancing the next generation, sparking equal opportunity, and keeping our region moving forward.

When you support United Way's Community Impact Fund, you are investing in programs focused on Health, Education and Economic Mobility; crisis response initiatives; funds for organizations leading innovative social and cultural change; leadership development programs; volunteer engagement; and many other resources that lift spirits and touch lives.

DOUBLE YOUR DOLLARS - Each new or increased donation to the Community Impact Fund will be matched, dollar-for-dollar up to \$500,000, thanks to the Canandaigua National Bank & Trust 6-County Challenge Grant.

Click on the link below to access the ((COMPANY NAME)) United Way online pledge site, and then enter the User ID and Password provided below.

((EPLDGE LINK))

User ID: ((USER ID))

Password: ((PASSWORD))

Thank you for making way for good with ((COMPANY NAME)) and United Way.

**United Way of Greater Rochester
ePledge Guide**

SAMPLE REMINDER EMAIL

FIRST NAME,

It's not too late to participate in the ((Company Name)) United Way Campaign!

Please click on the secure link to access the online pledging site and begin pledging:

((ELEDGE LINK))

User ID: ((USER ID))

Password: ((PASSWORD))

Thank you very much for your thoughtful consideration.