

The DonorPoint donation platform is flexible and customizable to meet the needs of your individual company and this document is a tool to assist you in developing and running a successful campaign. Answering the questions below will help you, your team and United Way of Greater Cleveland (UWGC) determine your specific needs. If you have any questions, please contact your UWGC Account Manager.

Company Name:

UWGC Account Manager:

EMAIL COMMUNICATIONS

One in 4 donors say that email is the communication tool that most inspires them to give to charity.

DonorPoint allows for flexible communications when a donor's email address is supplied. Launch information and reminder e-mails can be sent automatically. Reminders will be sent only to employees who have not responded at the time of the e-mail.

Would you like UWGC to send system generated emails for your campaign?

Yes

No, we will be sending internal reminders during the campaign

If Yes above, who will sign-off on campaign correspondence?

Name:

When an employee hits "Reply" to an email sent via DonorPoint (invitation, reminders, receipt), who should receive that email?

Name:

When emailing employees, will content links and embedded videos be accessible?

Yes

No

Other:

For each pledge or donation, DonorPoint will send a branded confirmation, which serves as a receipt and tax document. DonorPoint can be used to send a Campaign Wrap-up Message to donors or all employees; this message can include a final "Thank You" from your CEO or Annual Campaign team and a report of the campaign results against goal.

MESSAGING SCHEDULE

The Launch, Soft Close, Hard Close, and Payroll File dates will help inform and structure the messaging schedule. Use the dates below as references for when to send Campaign Launch, Reminder, Last Chance, Lapsed Donor, and Wrap-up messages.

Launch Date:

Hard Close Date:

Soft Close Date:

Payroll File Date:

| MESSAGE TYPE | DATE | TIME |
|--------------|------|------|
| Launch | | |
| Reminder #1 | | |
| Reminder #2 | | |
| Reminder #3 | | |
| Last Chance | | |
| Lapsed Donor | | |
| Wrap-Up | | |
| Additional | | |

DONOR SEGMENTATION

The DonorPoint system allows for standard donor segmentation. Donors will receive different messaging in accordance with their prior UWGC giving history (based upon the previous year's giving history only).

Standard UWGC donor segmentation:

No Donation

Donation <\$999

Humanitarian Society (Donation \$1,000+)

Philanthropy Society (Donation \$10,000+)

The DonorPoint system allows for custom donor segmentation according to your company's needs. If applicable, let us know below how you would like to segment your donors for messaging purposes.

Custom donor segmentation:

.....
.....
.....
.....

*Donor segmentation is not available with custom messaging.

SOCIAL MEDIA

United Way is active on multiple social media platforms, including Facebook, Twitter, Instagram, and LinkedIn. Please indicate below which platforms your organization uses and if UWGC may acknowledge your company's workplace campaign on social media.

If your organization utilizes social media, which platforms are most active?

Facebook Twitter Instagram LinkedIn Other:

List social media handles:

May United Way of Greater Cleveland acknowledge your company's workplace campaign via social media?

Yes No

For United Way of Greater Cleveland Use Only

Company Name:.....

UWGC Account Manager:.....

Company FRID:.....

Employee Campaign Manager:.....