WORKPLACE CAMPAIGN DONORPOINT BUILDING GUIDE

UNITEDWAY
GREATER CLEVELAND

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: ....

PRIMARY CAMPAIGN CONTACT INFORMATION

Employee Campaign Manager (ECM)
The ECM is the main contact at your organization buliding the bridge between your colleagues and UWGC.

Name: ....

Title: ....

Phone: ....

Email: ....

Grant this individual access to the adminstrative overview page and the ability to run reports

Backup Employee Campaign Manager (ECM)
The Backup ECM is who should be contacted if the ECM is unavailable or on vacation.

Name: ....

Title: ....

Phone: ....

Email: ....

Grant this individual access to the adminstrative overview page and the ability to run reports

IT Staff Contact
The IT Staff Contact is who we should work with for any IT related specifics, such as whitelisting and SSO setup.

Name: ....

Title: ....

Phone: ....

Email: ....

Grant this individual access to the adminstrative overview page and the ability to run reports

Payroll Staff Contact
The Payroll Staff Contact is the person we will send the payroll file to after the campaign is completed.

Name: ....

Title: ....

Phone: ....

Email: ....

Grant this individual access to the adminstrative overview page and the ability to run reports

Campaign Chair
The Campaign Chair is an organization leader or senior staff member who endorses campaign efforts.

Name: ....

Title: ....

Phone: ....

Email: ....

Grant this individual access to the adminstrative overview page and the ability to run reports

United Way of Greater Cleveland is mobilizing and empowering Greater Cleveland residents to help break the cycle of poverty.

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CAMPAIGN SETTINGS

United Way of Greater Cleveland will send your payroll file after the close of your campaign. Payroll Files will be returned to the company by **December 15 (Friday)** at the latest, unless special arrangements are made for Payroll Deduction handling.

Payroll File Due Date: ....

Payroll File Special Instructions: ....

Total number of Employees: ....

Campaign Launch Date: ....
The donation site must be fully tested and available for employee use by this date.

Soft Close Date: ....

Hard Close Date: ....
Calendar year focused campaigns will close no later than December 15 (Friday) at the latest, unless special arrangements are made for Payroll Deduction handling.

Will any of your employees use Paper Pledge Forms?

Yes   No

If so, who will collect and input Paper Pledge Forms?

Employee Campaign Manager

Other
   Name: ....
   Phone: ....
   Email: ....

Please indicate work location(s) of employees:

Cuyahoga County

Geauga County

Other US

Other North America

Other

If "Other US", "Other North America", or "Other" is selected, who will be distributing employee payments?

Your Payroll Department

UWGC

Will the campaign be promoted to retired employees?
If yes, please include Retirees in the Employee File and indicate their status in the Position Code column.

Yes   No

How should retired employees be contacted?

Direct mail

Online, with login

Online, without login

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PAYMENT OPTIONS

DonorPoint offers a variety of payment options for flexibility for employees and to provide the best giving experience. Please check the options you would like to offer your employees:

Payroll Deduction:
(One time or per pay period)

Yes   No

Credit Card:
(One time, quarterly, or monthly)

Yes   No

Bank Transfer/eCheck:
(One time, quarterly, or monthly)

Yes   No

Check:
(One time)

Yes   No

Direct Bill*:

Yes   No

Stock:

Yes   No

*With direct bill, a donor will receive invoices for their pledge on a periodic basis, sent to an address specified by the donor.

If you have selected Check as an option, please provide the contact who will be collecting and remitting check donations:

Employee Campaign Manager will fill this role

Name: ....

Phone: ....

E-mail: ....

Checks collected in Cuyahoga or Geauga counties should be sent to:
United Way of Greater Cleveland
ATTN: Accounts Receivable
1331 Euclid Ave.
Cleveland, OH 44115

Checks collected outside of Cuyahoga or Geauga counties should be sent directly to the local United Way.
Please forward all checks, no later than one week after the close of your campaign.

Please specify all of the pay periods that your employees have for payroll deduction:

12 Pay Periods   24 Pay Periods   26 Pay Periods   52 Pay Periods

Special: ....

Is your company interested in offering rollover for Payroll Deduction gifts next year?
If yes, your UWGC Account Manager will contact you with additional details.

Yes   No

When onboarding, does your company solicit New Hires?
If yes, your UWGC Account Manager will contact you with additional details.

Yes   No

Any payroll deduction cancellations, before as well as after the site has been closed, should be forwarded immediately to your UWGC Account Manager to ensure accurate reporting for campaign totals. If the campaign is closed, please also notify your payroll contact at your company to cancel the deductions.

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DONORPOINT IT WHITELIST ITEMS AND BROWSER REQUIREMENTS

DonorPoint is supported on the most current versions of:

• Microsoft Edge   • Mozilla Firefox
• Google Chrome   • Apple Safari

Per new PCI Data Security Standard compliance guidelines, Internet Explorer will no longer be able to access the DonorPoint website as of June 30, 2019, due to the TLS 1.0 data security transfer protocol no longer being supported. To meet these PCI compliance guidelines your browser must run on TLS 1.1 or higher. Employees who attempt to use Internet Explorer to access the donation site will see a popup that will redirect them to Microsoft Edge (if available) or direct them to download a supported browser.

Will your IT department be able to meet the browser standards above?

Yes   No

Please also ensure your IT department whitelists the following domains (verify each year):

• donorpoint.com   • 211oh.org   • gobigriver.com

• unitedwaycleveland.org   • uwsgc.org   • give.unitedwaycleveland.org

Is your company interested in using Single Sign On for this year's campaign?
If yes, your UWGC Account Manager will contact you with additional details and arrange a technical meeting.

Yes   No

Benefits of Single Sign On (SSO) include:

• No need for login information to be provided to employees.

• Clicking the link will automatically log the employee into the site with immediate access to the pledge form.

• No time spent by you or United Way staff helping employees with forgotten passwords.

• QR codes can be created to display in offices to easily direct employees to the donation site

CAMPAIGN LOGISTICS

One in 4 donors say that email is the communication tool that most inspires them to give to charity.
DonorPoint has the ability to create, schedule, and send emails. Who will be sending email updates during the campaign?

UWGC (through DonorPoint)   Organization will be sending internal emails to employees

The donation site will be personalized to greet each employee by name, and thank them for their donation in the last campaign. **Does your company want to include a personalized Ask Amount for each employee this year?**

Yes   No

The company will provide an Ask Amount for each employee in the Employee File.

Calculate an Ask Amount based on ....% of last year's donation, or $................ for new employees/ non-donors.

DONORPOINT ADMINISTRATION

How many people in your organization will need to run reports from the system? ………………………

In addition to the Primary Campaign Contacts, are there any other individuals who will need to run reports? If so, please denote their names below:

Name: ……………………………………   Name: ……………………………………   Name: ……………………………………

Email: ……………………………………   Email: ……………………………………   Email: ……………………………………

Will you be using location leads or team captains?

       Yes   No

If yes, should locations leads or team captains have access to view a donor's gift amount (dollar value)?

       Yes   No

REPORTS AND EXPORTS

The DonorPoint system offers a variety of self-serve reports and dashboards for Employee Campaign Managers to monitor and analyze the company campaign. All self-serve reports are exportable as CSV files to use in Excel.

Advanced reporting is available, but requires additional information. Examples of advanced reporting include (but are not limited to):

- Division
- Department
- Cost center

- Job level
- By manager or team leader
- Different "messaging" to groups

If your company would like advanced reporting, please indicate how you would like to identify specific groups of employees:

……

……

……

If requesting advanced reporting, this information must be included in the Employee File.

For United Way of Greater Cleveland Use Only

Company Name:……………………………………………………………………………………………

UWGC Account Manager:…………………………………………………………………………………

Company FRID:……………………………………………………………………………………………

Employee Campaign Manager:……………………………………………………………………………