

WORKPLACE CAMPAIGN DONORPOINT BUILDING GUIDE

DonorPoint is a customizable platform to meet the needs of your company. Completing this document will help you build a successful campaign that meets your needs. If you have any questions, 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 building the bridge between your colleagues and UWGC.

Name: _____

Title: _____

Phone: _____

Email: _____

☐ Grant this individual access to the administrative 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 out of the office.

Name: _____

Title: _____

Phone: _____

Email: _____

☐ Grant this individual access to the administrative 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 items, like whitelisting and SSO setup.

Name: _____

Title: _____

Phone: _____

Email: _____

☐ Grant this individual access to the administrative 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 administrative overview page and the ability to run reports.

Campaign Chair

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

Name: _____

Title: _____

Phone: _____

Email: _____

☐ Grant this individual access to the administrative overview page and the ability to run reports.

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 **Friday, December 12** at the latest, unless special arrangements are made for payroll deduction handling.

Payroll File Due Date: _____

Payroll File Special Instruction: _____

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 Friday, December 12 at the latest, unless special arrangements are made for payroll deduction.

Will any of your employees use paper pledge forms?

☐ Yes ☐ No

Please indicate work location(s) of employees:

- ☐ Cuyahoga County
☐ Geauga County
☐ Other US
☐ Other North America
☐ Other

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

If so, who will collect and input paper pledge forms?

Name: _____

Title: _____

Phone: _____

Email: _____

☐ Employee Campaign Manager will fill this role.

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

☐ Your Payroll Department

☐ UWGC

How should retired employees be contacted?

☐ Direct mail

☐ Online, with login

☐ Online, without login

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**One-Time Check:**☐ Yes ☐ No***Direct Bill:**☐ Yes ☐ No**Stock**☐ Yes ☐ No

**With direct bill, donor will periodically receive invoices, sent the 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:

Name: _____

Title: _____

Phone: _____

Email: _____

☐ **Employee Campaign Manager will fill this role.**

Checks collected in Cuyahoga or Geauga Counties should be sent to:

United Way of Greater Cleveland
PO BOX 932086
Cleveland, OH 44193

Checks collected outside Cuyahoga or Geauga Counties should be sent directly to your 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 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.

DonorPoint IT Whitelist Items and Browser Requirements

DonorPoint is supported on the most current versions of:

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

Per new PCI Data Security Standards, 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 pop-up 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
- unitedwaycleveland.org
- 211oh.org
- uwsgc.org
- gobigriver.com
- 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:

- No need for login information to be provided to employees.
- No time spent by you or UWGC staff helping employees with forgotten passwords.
- Clicking the link will automatically log the employee into the site with immediate access to the pledge form.
- QR codes can be created to display in offices to easily direct employees to donation site.

Campaign Logistics

One in 4 donors say that email is the communication tool that most inspires them to give to a 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 last campaign. **Does your company want to include a personalized Ask Amount for each employee?**

☐ 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 list their names and emails below:

Name: _____

Name: _____

Email: _____

Email: _____

Will you be using location leads or team captains?

☐ Yes ☐ No

If yes, should location 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 group.

If your company would like advanced report, 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: _____