

## 2020 Workplace Giving Setup Form

***This form or the online version at [upaf.org/wpg-setup-form](http://upaf.org/wpg-setup-form) must be completed to have a Workplace Giving site set up and/or receive pledge forms for your company. Please email this completed form and any necessary attachments to your UPAF contact and [eg\\_administrators@upaf.org](mailto:eg_administrators@upaf.org).***

***Please complete this form no later than ONE WEEK prior to your campaign start.  
Contact your UPAF contact with any questions regarding this form.***

**COMPANY NAME:** \_\_\_\_\_

**WORKPLACE GIVING AMBASSADOR:** \_\_\_\_\_

**PHONE:** \_\_\_\_\_ **EMAIL:** \_\_\_\_\_

**1. Campaign Start Date:** \_\_\_\_\_ **Campaign End Date:** \_\_\_\_\_

**2. Campaign will use:**

\_\_\_\_ **Online Workplace Giving** (please complete page 2)

Online Giving Contact (if different than Ambassador): \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Workplace Giving Site Open Date (if different than company campaign start): \_\_\_\_\_

Workplace Giving Site Close Date (if different than company campaign end): \_\_\_\_\_

\_\_\_\_ **Paper Pledge Forms**

Number of pledge forms needed: \_\_\_\_\_

Date pledge forms are needed by: \_\_\_\_\_

Should pledge cards include a company letter? No \_\_\_\_ Yes \_\_\_\_ (please see 3. below)

Should pledge cards be personalized to include employee name? No \_\_\_\_ Yes \_\_\_\_ (please see 4. below)

Should payroll deduction be a contribution option? No \_\_\_\_ Yes\* \_\_\_\_

\*Contact information for payroll confirmation and billing:

Name: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

\_\_\_\_ **Both**

**3. For best results, include a letter from your CEO or company leadership for the pledge form. Letter should fit in an 8.5" x 6" space. Letter should be in MS Word format and include an electronic signature file. Please send this letter to [eg\\_administrators@upaf.org](mailto:eg_administrators@upaf.org).**

**4. For personalized pledge forms please email your employee data file to [eg\\_administrators@upaf.org](mailto:eg_administrators@upaf.org). File should be in Excel or CSV format. File must contain:**

- Employee First Name
- Employee Last Name

***Please see page 2 for setup of the online Workplace Giving site.***

**Completion of page 2 is necessary only for campaigns utilizing the online Workplace Giving component.**

5. Should a company logo be displayed on your site? No\_\_\_\_ Yes\_\_\_\_

If yes, please send to eg\_administrators@upaf.org. Logo file must be in JPEG, GIF, PNG or BMP format.

6. What is the format of your username? \_\_\_\_\_

Company email address as username is recommended. Each user must be assigned a unique username; usernames must be unique across the *entire* system. Usernames must include the company name (abbreviations are acceptable) and CANNOT contain spaces.

7. What is the format of your password? \_\_\_\_\_

Each user must be assigned a password. This is not required to be unique for each user and CANNOT contain spaces or quotation marks.

8. Should users be prompted to change their password on first login? No\_\_\_\_ Yes\_\_\_\_

9. Should the welcome page of the site include a greeting letter? No\_\_\_\_ Yes\_\_\_\_

If yes, please send this letter to eg\_administrators@upaf.org. Company greeting letters are typically from the company CEO or UPAF Ambassador(s). Letter should be in MS Word format. Please also include an electronic signature file or photo file to be used in lieu of a signature.

10. What contribution options should be offered to your employees (check all that apply)?

\_\_\_\_ Payroll Deduction – recurring\*

\_\_\_\_ Payroll Deduction – one time\*

\*Date payroll deductions will begin: \_\_\_\_\_

\*Contact information for payroll confirmation and billing:

Name: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

\_\_\_\_ Credit Card – monthly

\_\_\_\_ Credit Card – one time

\_\_\_\_ Check – Person at the company to whom check donations should be routed: \_\_\_\_\_

\_\_\_\_ Direct Billing from UPAF (Minimum donation: \$10)

\_\_\_\_ “I do not wish to contribute” option

11. **For online Workplace Giving please email your employee data file to eg\_administrators@upaf.org. File should be in an Excel or CSV format. File must contain:**

- Employee First Name
- Employee Last Name
- Unique Username
- Password
- Employee Email Address (UPAF will not use email addresses without permission)
- Payroll Frequency (only if recurring payroll deduction is a contribution option)

File may also include:

- Employee ID
- Division
- Department
- Location

12. Who should be provided administrative access to the site? \_\_\_\_\_

Administrative access to the site will only be granted with approval from Workplace Giving Ambassador.