# ePledge Ambassador Manual

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# WELCOME

We’re excited to welcome you to the 2020 Miami-Dade County Public Schools United Way Campaign! We hope that these guidelines will provide you with important campaign information, fun and engaging ideas, key dates and the tools necessary to have a successful campaign.

As a United Way Ambassador, we appreciate your support, time and dedication to successfully manage and organize campaign efforts. Because of you, the quality of life for countless Miami residents will improve as the United Way continues to focus on education, financial stability and health.

For over 40 years, Miami-Dade County Public Schools has partnered with United Way to help expand possibilities for our schools and community as a whole. Last year, the school district raised over $1.4 million.

In turn, United Way invested $2.73 million back into programs that provide valuable services to students such as:

* YMCA Afterschool & Summer Camp Programs
* Big Brothers Big Sisters Mentorship Program
* Urban League of Greater Miami Achievement Matters Program
* Overtown Youth Development Program

United Way has also funded a number of projects for Miami-Dade County Public School locations:

* Mural and beautification projects: D.A. Dorsey Technical College, Golden Glades Elementary School, Howard D. McMillan Middle School, Jesse J. McCrary Elementary School, West Homestead K-8 Center, Paul Bell Middle School and Poinciana Park Elementary School.
* Landscaping projects: Miami Jackson Senior High, Santa Clara Elementary School, Lillie C Evans Elementary School and Miami Shores Elementary
* Holiday Gift donations: Coral Way K-8 Center

The generosity, caring spirit, and success of this partnership are a testament to what we can accomplish together when we work for a common goal.

Our goal is to create lasting changes that prevent problems from happening in the first place. We invite you to continue to be a part of the change. Give. Advocate. Volunteer. Together, we stand for a **STRONGER MIAMI.**

# ABOUT UNITED WAY OF MIAMI-DADE

**Mission**

Building community by helping people care for one another.

**Vision**

We will have a caring community strengthened by its diversity and compassion. United Way will be seen as a catalyst in building community by bringing hearts, minds and resources together.

We focus on the things that everyone needs for a good life: a quality education that leads to a stable job, enough income to support a family through retirement and good health.

We bring together the people and organizations from across the community who share in our vision and have the energy, passion, expertise and resources to get the work done. They are essential to our success and the success of our community.

**Last year through United Way:**

* **3,089** young children received quality early interventions and experiences, improving their chances for success
* **2,122** early education professionals received 30,384 total hours of professional learning
* **18,000** youth at 29 United Way-funded programs improved their academic skills and stayed on track to graduate
* **1,644** young children were provided 6,197 hours worth of training to improve their literacy skills
* **9,845** families accessed free tax prep services, receiving $11.5 million in refunds
* **50,000** people received emergency food and shelter – totaling more than $1.3 million – through the Emergency Food and Shelter program
* **3,000** adults, including those with disabilities – received job training and other support to help them land jobs

**While our work continues to be critical, we are also on the front lines of COVID-19 response**

As of June 11th, we’ve raised more than $3.7 million for the Miami Pandemic Response Fund, which offers services for individuals, families and small businesses.

* Provided more than $650,000 in assistance to support families in paying rent/mortgage, food and other essentials
* Spearheaded the delivery of 10,200 meals to 1,700 older adults due to closure of senior meal sites/care centers
* Provided meals and food packs to over 14,000 families in our community, including Early Head Start-Child Care Partnership program and Miami-Dade County Public Schools families
* 2,000 + volunteers hours were dedicated to COVID-19 relief efforts
* Our work is more necessary because of this crisis.

# AMBASSADORS ROLES

United Way Ambassadors should be appointed from each work location by the Principal or Head Administrator and will be responsible for carrying out the 2020 United Way Employee or Student Campaign at their work location.

All work locations will have assigned at least one Employee Ambassador, one Student Ambassador (if applicable), and one ePledge Ambassador. An employee should not hold both Employee and Student Ambassador Roles***. Each position should be filled by a different individual per role.* *Non-school sites may have both the epledge and employee role filled by one individual.***

* **Employee Ambassadors** present the campaign to all staff, inform them of the on-line system, present the United Way video and educate staff on United Way.
* **Student Ambassadors** manage and execute the Student Campaign.
* **ePledge Ambassadors** may not hold the position of either Employee or Student Ambassador and are responsible for inputting data and providing reports.

# EPLEDGE AMBASSADOR RESPONSIBILITIES

The ePledge Ambassador is typically someone who handles money and can view sensitive information such as employee donations. At a school site this is usually the treasurer or bookkeeper. They work directly with the Employee Ambassador and Student Ambassador in entering benchmarks, goals met, confirming check and cash donations and printing reports.

ePledge Ambassadors will be entering data into the ePledge site and providing reports to the Ambassadors.

**How to enter employee pledge (only enter a pledge if you have the employee’s physical pledge form):**

1. Click on ePledge Administrator tab located at the bottom left of the website.
2. Click on Employee Search.
3. Search by employee name or employee ID.
4. Enter the employee first and last name or employee ID.
5. Click on Add Pledge
6. Indicate if you’re updating the pledge or if this is a new pledge.
7. Proceed to enter the pledge information for the employee
8. Click on the “Submit” button.

A confirmation email will be sent to the employee for their records and tax purposes.

**How to access Employee donation reports:**

1. Click on the ePledge Administrator tab located at the bottom left of the screen.
2. Click on Transaction Details.
3. Click on Export All Details to Excel.

**How to access & finalize Transmittal Forms for Employee Campaign:**

1. Click on ePledge Administrator tab located at the bottom left of the website.
2. Click on Employee Campaign Transmittal Form button.
3. Download the employee transmittal form PDF
4. Using the data in ePledge, fill out the corresponding fields
5. When the form is accurate, have the Employee Ambassador and the Principal/Head Administrator sign.
6. Keep a copy of the Transmittal Form with signatures for your records.
7. The original form should be submitted by the Employee Ambassador to United Way along with any checks and paper pledge forms. The Employee Ambassador should keep a copy of the form for their records.

Please download the Employee and Student Ambassador Timelines to see important dates throughout the campaign.

**Collect Donations**

**Wednesday, November 12th, 2020**, will be the last day for collecting money or entering payroll deductions for the United Way campaign. The following steps must be completed:

* All paper pledge forms along with any designation cards must be collected and provided to the ePledge Ambassador for data inputting.
* All cash and checks must be collected, recap forms completed, and paper pledge forms shared with ePledge Ambassador for data inputting.
* A check must be requested from the school treasurer for the total amount of cash donations. This amount must reconcile with the sum of the receipts issued. The receipt book must be returned to the treasurer.
* Transmittal form must be printed by the ePledge Ambassador, reviewed and signed by both the Employee Ambassador and the Principal/Head Administrator.
* Pledge cards, personalized checks, school checks and the original transmittal form, must be placed inside the specially marked envelope and put in school mail starting **November 13th through November 17th**. **Must be hand delivered November 18th, 2020, to the United Way of Miami-Dade (3250 SW 3 Ave, Miami, FL 33129, Work Location: 9601).**
* No time extensions will be granted. Please seek support from the Principal/Head Administrator to assist in securing donations from employees. If schools or work locations turn in packets late, they may not receive awards at the final ceremony.
* You do not have to wait until November 12th to turn in your campaign to the United Way of Miami-Dade. Campaign information may be put in school mail or hand delivered as soon as completed.
* If someone brings you a paper pledge card or check after your package has been submitted, add the amount in the corresponding section of the copy of your transmittal form and write on the top of the page **REVISED**. Hand deliver the paper pledge card, check, and the revised transmittal form to the United Way of Miami-Dade.

The United Way transmittal from will be available online through ePledge. The ePledge Ambassador will be able to print this form to be reviewed, completed and signed by the Employee Ambassador and the Principal/Head Administrator. The Employee Ambassador is responsible for mailing the transmittal form with the original signatures to United Way in the Employee envelope. Two copies should be made for school records.

**Methods of Contribution**

There are four methods of contribution:

1. Payroll deductions
2. Credit card
3. Cash
4. Check
5. Election Funds Transfer

**Payroll Deduction**

The ideal method of contribution is payroll deduction because it is the easiest. It allows the contributor to donate a much larger amount. The ePledge system will generate an email confirmation or the employee may use the last payroll stub of the calendar year as their receipt for income tax purposes.

Please note payroll donations are continuous. Employees who wish to continue their current deduction do not need to log into ePledge. If they’re Bell Club, Goal Buster or a Leadership donor they must re-enter their donation even if it’s the same because categories have to be re-entered every year. Designations must also be re-entered.

**During campaign time, October 12th - November 12th, if an employee wishes to stop or change their deduction amount they must log into ePledge and update their gift information. During non-campaign time, employees can stop payroll deduction or make a change to their ePledge by completing the *Stop Payroll form***, **which can be found at** [**www**.**community.dadeschools.net**](http://www.community.dadeschools.net) **,** **and returning it to the Office of Community Engagement.**

Things to remember about payroll deductions:

* During campaign time, stop payroll forms are used. Payroll will pick up all new information from the ePledge reporting system as of November 24th, 2020 to implement the first payroll deduction for the 2020 campaign on December 4th, 2020.
* The total contribution will be divided by the number of regular payroll checks in a year. A donor cannot request to have their total contribution deducted in one or two checks.
* The minimum donation per paycheck is $1.00. This represents $20.00 a year for 10-month employees, $24.00 a year for 11-month employees and $26.00 for 12-month employees.
* Ten–month employees can only deduct their donation during the 20 payroll checks of the regular school year, even if he or she has opted for deferred paychecks. Ten-month employees only have United Way deductions during the regular school year.
* The first column of the payroll stub reflects the amount deducted from that check. The second column under the heading Year to Date reflects the total amount taken for the calendar year.
* The contributor should keep a copy of their gift confirmation e-mail for reference.
* It may take up to 30 days from the time a request to stop or change a payroll deduction is received until it is reflected in the check.

**Credit Card Contributions**

If an employee would like to make a credit card contribution, they can opt in for a recurring credit card payment or can select a one-time charge on the contributors’ credit card and can be made via ePledge.

**Electronic Funds Transfer**

If an employee would like to make a contribution from their checking account, they can select this option via the ePledge portal.

**Cash Contributions**

School Sites

Employees pledging a cash donation should also enter their pledge via the ePledge system and submit their cash to the Employee Ambassador. Employee Ambassadors must collect the cash from the employees. All cash collected should be deposited on a daily basis along with a copy of the work location’s cash recap form FM-1004, following internal accounting procedures.

Employee Ambassadors will issue a receipt from the M-DCPS receipt book provided by the school treasurer, FM-0976, for any special events cash or donations given in the amount of $15.00 or more.

Non-School Sites

If you’ve received cash from an employee, please use cash recap online at <http://www.engagemiamidade.net/> . It is suggested to convert the cash into a money order, which can be included in the Employee Campaign Envelope.

**Check Contributions**

Employees making a check donation should also enter their pledge via the ePledge system and submit their check to the Employee Ambassador. Employee Ambassadors must collect the checks from the employees.

**Please make sure that checks are made out to United Way**, so that they may be used as deductions for income tax purposes. Also, checks will not be cleared until the latter part of November or in the month of December.

Reminder: Checks made out to United Way of Miami-Dade cannot be deposited in the school’s bank account. They should be kept in the envelope provided until the campaign is completed. Ambassadors may request to have the envelope kept in the school safe.

**It is critical that Employee Ambassadors collect cash and checks from those employees who have pledged a cash or check contribution through the ePledge system. Please communicate with your ePledge ambassador to provide a report that shows who has made a cash or check contribution on a weekly basis.**

*\*Note that credit card, cash and check contributions are not continuous. Employees who donated utilizing these methods last year may do so again this year to participate in the 2020 campaign.*

**Gift Designations**

Designating a gift is optional. Contributors should be aware that the United Way of Miami-Dade can only designate to agencies that qualify under non-profit, tax exempt IRS 501 (c) 3 status.

In order to make a designated gift, the designated amount must be over $100. Donors may also designate a portion to a specific charity and leave the remaining portion to United Way.

If a donor wishes to designate all or a portion of their gift, they can visit the Contact Us tab located within ePledge. Donors should click on the drop down menu and select the designation question. They would then fill out the designation form but only **AFTER** completing the initial gift pledge process. Also note that designations do not carry over from one year to the next. Donors must go in every year and complete and submit the designation form.

Please note that if you submit a designation via payroll deduction, the agency will receive funding in alignment with the receipt of the MDCPS quarterly payroll payout to United Way.

**Gifts that are not designated are leveraged to a network of programs targeted to make the greatest impact on those who need help the most. These funds then qualify for matching funds from government agencies**

**Special Giving Categories**

We recognize employees who’ve decided to go above and beyond their giving with Special Giving Categories that have great benefits. The following options are available for selection within the “Give Now” section when making a pledge on ePledge.

* **School Bell Club** is for contributors who give a day’s pay or more but less than $500. Full-time employees is equal to one day’s pay and part-time employee is equal to 4x their hourly rate.

**Recognition:** A Bell Club pin.

* **Goal Busters** are contributors who give $500 to $999.99.

**Recognition:** A Goal Buster pin and invitation to the Campaign Awards Ceremony.

* **Superintendent’s Leadership Circle** are contributors who give $1,000 or more (individually or with a spouse). A 10-month employee would pledge $50.00 per pay period, an 11-month employee would pledge $42.00 per pay period, and a 12-month employee would contribute $38.50 per pay period.

**Recognition:**

* Leadership pin
* Invitation to the Campaign Awards Ceremony
* Invitations to United Way Leadership Reception and other special events
* Opportunities to meet and network with our community’s top leaders and philanthropists

**Leadership Giving Options:**

* **Family gift**: A gift can be combined with a spouse or partner’s gift. Family gifts are recognized for $1,000 or more from couples (from the same or different organizations) for the Leadership Circle. Remind employees to enter complete family giving information on ePledge in order to be properly recognized as Leadership Circle members.
* **Fast Track giving**: United Way’s fast track giving program allows employees to join the leadership level by committing to reach that level within three years. For example, an employee could fast track by giving $550 the first year, $750 the second year, and $1,000 the third year. They will be recognized as a Leadership contributor and receive all of the benefits of Leadership giving starting the first year.

**Instructions for Completing Transmittal Form**

The transmittal form will now be processed through ePledge.

1. The ePledge Ambassador will print the transmittal form from the ePledge site. Please use the data captured in ePledge to fill out the corresponding fields on the form.
2. The form should be reviewed, any incomplete or missing information added and signed by both the Employee Ambassador and the Principal/Head Administrator.
3. The Employee Ambassador will place the transmittal form with original signatures in the Employee envelope along with checks and any other related campaign materials. Make two copies, one for the school and the other for the Employee Ambassador’s records.
4. Mail the envelope through the school mailing system that will be delivered to United Way (Work Location: 9601).

**Check list for Employee envelope:**

* Original signed transmittal form
* Checks (personal)
* Check for special events
* Check/money order from cash (do not mail cash)
* Pledge forms and designations cards separated by payment

Please review the Employee Ambassador Timeline to see important dates throughout the campaign.

# RESOURCES

The ambassador toolkit is a great resource to ensure that your campaign is successful. You will be able to download your toolkit at [www.community.dadeschool.net](http://www.community.dadeschool.net) or [www.unitedwaymiami.org/mdcps](http://www.unitedwaymiami.org/mdcps)

**Some of the documents in the toolkit are:**

Employee Timeline

Student Timeline

M-DCPS 2020 Employee Gift Form

Ambassador Guidelines

Employee, Student and ePledge training

ePledge Guide

United Way Campaign Brochure

United Way Campaign Video

United Way: What Your Money Buys document

Free Services Brochure

Payroll Deduction Table for 10, 11 and 12 Month Employees

Stop or Change Payroll form

**Office of Community Engagement**

Employee Campaign Manager: Diana Venturini, dventurini@dadeschools.net

To access the campaign toolkit and more information visit the Office of Community Engagement Website: [www.engagemiami.net](http://www.engagemiami.net)

# Region Liaison

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