

# HOW TO ROCK **YOUR** UNITED WAY CAMPAIGN



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# United Way of Yellowstone County

## CAMPAIGN CALENDAR

### 2024 Campaign Dates

DATE	WHAT	TIME	NOTES
8/6/2024	ECC Training	3:00 pm	In person /virtual
8/7/2024	ECC Training	12:00 pm	In person/virtual
8/8/2024	ECC Training	9:00 am	In person/virtual
8/14/2024	Operation School Supply	11:00 am - 3:00 pm	Collection Drive
9/12/2024	<u>CommUnity Rally</u>	4:30 - 7:30 pm	In person; Celebrate with us and Kick-off Workplace Giving Campaign
10/2/2024	Volunteer Engagement Session		Virtual; Learn how you can volunteer with United Way!
10/10/2024	ECC Training	10:00 am	In person/virtually
10/24/2024	Community Investment Partner Information Session	1:00 pm - 2:30 pm	In person; Learn about your donation in action!
10/24/2024	<u>SocktoberFest</u>	11:00 am - 3:00 pm	Collection Drive
12/3/2024	Stuff the Sleigh - Giving Tuesday	4:00 pm - 6:00 pm	Collection Drive /Email campaign
1/08/2025	Volunteer Engagement Session	10:00 am	Virtual; Learn how you can volunteer with United Way!
2/27/2025	Community Leaders Luncheon	11:30am-1:00 pm	In person; Campaign Awards, Thank you to our ECC's & Volunteer Recognition
3/7/2025	ECC, Community Relations – Think Tank	10:00 am - 10:30 am	Virtual; recap 2024 campaign, share ideas for 2025 campaign
6/26/2025	Day of Action	1:00 pm - 4:30 pm	In person

ECC Training sessions are fun, informative, and will prepare you for success. Plus you'll meet other business leaders with similar passions for our community. Register for ECC training sessions [HERE](#).

# TIMELINE TO A SUCCESSFUL CAMPAIGN

## BEFORE CAMPAIGN

- Set Campaign dates. Two weeks before the launch, notify UWYC staff to allow plenty of time to create customized messaging and to get your pledge form/online donation procedure set. We can support you!
- Assemble a Campaign Team to help distribute Campaign messaging across each department or team. A good ratio is one Campaign Team member per every 25 employees. Use employee's expertise; for example, marketing employees can help with communications, and payroll with confirming processing dates.
- Set a campaign goal that your Campaign Team and employees can rally behind. Review last year's results and examine what messaging was most effective.
- Create a communications plan. (i.e. ). Gather a contact list with names and work emails. Map out the who-what-where-when-how for the likes of messaging about campaign rollouts, kickoff events, mid-campaign updates, a final push, and thank you's.
- Determine how employees can donate (see page 6) and provide them with instructions. Our custom business landing pages are a seamless and eco-friendly option.
- Get support from company leadership and consider the best practices for *your* company. Consult parent companies, HR/Legal teams, unions, etc. Ask company leaders to lead "Why I Give" messaging.
- Promote you campaign 2-3 weeks before it launches, and send out follow-ups as launch approaches.
- Have any signage or displays prepared. Consider employee entrances, common areas, or restrooms. Download supplies from our online toolkit or ask your United Way rep!

## DURING CAMPAIGN: DAY 1

- Use your planned messaging to launch your campaign. Consider using video messages ("Why I Give") or a statement from your organization's leadership to encourage donations and make sure to check out all of the resources in the [Campaign Toolkit](#). Top-down messaging is effective!
- Send emails throughout the Campaign on a company-wide level. Don't forget our [customizable templates](#)!
- Plan a campaign kickoff event. See the events section on page 6, or our [FUN\(d\)raising ideas](#).
- Focus on setting a high-energy tone. Give social media shout-outs, prizes, and get enthusiastic.
- Consider a presentation from UWYC staff for your kickoff. We're always happy to help!

# TIMELINE TO A SUCCESSFUL CAMPAIGN

## DURING CAMPAIGN: MID-CAMPAIGN

- Stay in regular contact with your UWYC Rep and with company employees. Lean on resources in our campaign toolkit like email templates and Fun(d)raising Guide. Let us help!
- Run team challenges to encourage ongoing participation
- Utilize the Campaign Team members to keep the Campaign top of mind on team conference calls or personal ask emails. Conduct regular calls with team leads to discuss strategies and needs for their team.
- Share impact equations – what does my donation do at various levels to employees?
  - \$5 a paycheck buys books for 47 kindergarteners.
  - \$10 a paycheck provides 5 months of advocacy for an abused or neglected child.
  - \$20 a paycheck ensures 104 meals for a senior in need of socialization.
  - \$100 a paycheck changes the life of a child with a scholarship for after-school care.
- Change it up. Consider adding a wacky challenge, like your CEO dying their hair a crazy color if a goal is met.

## DURING CAMPAIGN: FINAL PUSH

- Consider a countdown to the final day of campaign
- A fun event or prize can help keep excitement high throughout campaign
- Use your goal. Are you close? Or have you already beat it, and could set a new one?
- Use your company landing page to keep employees updated

## AFTER CAMPAIGN

- Finalize Campaign results. Submit any payroll deduction information to your HR or payroll processing department. Turn in your Campaign Summary Report.
- Consider sending a note of appreciation to the entire company. Announce and celebrate your results!
- Specifically thank your Campaign team, company leadership, and donors.
- Debrief with you UWYC Rep. What went well? Do we have ideas for next year? Do any supplies need to be picked up?



## E-PLEDGE CARDS

- Use our easy and secure payment portal to make your one-time or recurring donation:
  - <https://www.unitedwayyellowstone.org/civicrm/contribute/transact?reset=1&id=1>
- Remind your team to include your Company's name in the Organization Field to ensure all contributions count toward your collective goal.
- Text DONATE to 313131
- Our QR codes are:



DONATE ONLINE



PAYPAL CHARITY



- E-Pledge provides a personalized (and secure) online experience for each employee to make their donation online in less than 2 minutes. Results are tracked in real-time on a digital thermometer. There's no cost for setup. Reach out to your United Way staff partner to learn how to get started.
- *Paper pledge forms can be available upon request. Access printable forms online [HERE](#).*

## LANDING PAGES

- If your company has a landing page, it's a great resource to collect donations through on-page pledge cards
- Find additional resources about United Way of Yellowstone County's work
- Employer-specific portals that emphasize the connection between your business and UWYC

## THIRD PARTY PROCESSING

- Many larger companies are choosing to invest in third-party payment processors, or their own system to make and track donations.
- Make sure you know how to access your system and explain to your co-workers how to as well.
- Encourage your team to send their information to us so that we can properly thank them!



## CORPORATE MATCH

- Determine if your company will be making a contribution to United Way and/or if they will match employee contributions. This can be a powerful way for company to generate goodwill and establish its commitment to our community.



# SETTING YOUR GOALS

- **Do you know the giving capacity of your workplace?**
- Discuss a realistic and achievable goal for your Campaign with your Campaign Team.
- Review your achievements from last year and consider whether you can do more this year.
- Use the worksheet below to help you determine your goals and record this Campaign's data for next year's reference.

Statistic	Benchmark	This Year's Goal
<b>Set an Employee Participation Goal</b> (We never recommend 100% Not everyone can/will give)	60% or more	
<b>Total Giving Employees</b> (Multiply your total employees by your participation goal)		
<b>Set an "Average Gift" Goal</b>	\$250 or higher	\$
<b>Total Employee Giving Goal</b> (Multiply your total giving employees by your average gift)		\$
<b>Corporate Giving</b> (Discuss with your team how the company will participate)	(If a corporate gift is possible)	\$
<b>Corporate Matching</b> (Discuss if your company could match 1:1 or 1:2)		
<b>Other Fun(d)raisers &amp; Events</b>		\$
<b>TOTAL WORKPLACE GOAL</b>		\$

## USE AVAILABLE RESOURCES

- The **Campaign Toolkit** includes **sample email messaging, video links, visual assets, and more.**
- Your United Way Rep can guide you through all steps of running a campaign, as well as help you set goals, train your team, and more. UWYC staff can also give in-person presentations.
- Need something that is not available in the Campaign Toolkit? Let us know: [campaign@uwyellowstone.org](mailto:campaign@uwyellowstone.org)

## COMMUNICATIONS

- Consolidate and coordinate communications to avoid overwhelming your employees.
  - We provide sample email messages to get you started.
  - Use personal and company social media platforms as available
- Promote any corporate match, corporate gifts, or other incentives to increase contributions and reach your goal.
- Have your Campaign Team individually meet with employees (in-person meetings are optimal, and phone calls are better than emails). People give to people, not words!

## INCENTIVES

- Popular incentive prizes for Campaign participation include: a paid day off, gift cards to local restaurants, raffles for unique experiences or items, prime parking spaces, company attire, free meals, and various other rewards.
- Consider using completed pledge forms to enter the raffle.
- Use our [Fun\(d\)raising document](#) for more ideas.

## EVENTS

- Encourage employees to participate in virtual volunteer opportunities either on their own or as a company.
- If possible, consider having in-person events once the Campaign is launched in order to promote donation options and have fun.
  - Popular events include dress-down days, chili cook-offs, potluck lunches, silent auctions, and bake sales.
- If needed, find opportunities to create virtual events, such as: hosting a Zoom kick-off for employees to hear from company and Campaign leadership, hosting a virtual silent auction with prizes such as gift cards, a lunch with the CEO, or a virtual day of impact.

## RECOGNITION & APPRECIATION

- Send appreciative e-cards from your CEO, Campaign Team, Company Leadership, or other team members.
- Send personal notes to each of your Campaign Team members.
- Highlight givers of a certain level through a company call or monthly e-newsletter.
- Host an event for donors who give at a certain level.
- Publicize results and reiterate and clarify the impact of gifts via your company newsletter, email, or intranet.
- Recognition not only rewards donors, but it generates wider goodwill for your company. Talk to leadership or marketing about promoting results more widely.



**Be recognized as a company that improves lives in our community.**

## SUMMARY

Our campaign awards are designed to honor companies that go above and beyond in not only their giving, but in their dedication to United Way's mission. Check out the requirements for each award!

### Circle of Distinction

Our Circle of Distinction honors companies who were able to increase their employee, corporate, or special event giving by 10%. These companies have also met the requirements for the Circle of Honor award.

### Spirit of Hope

Our Spirit of Hope award honors one small business and one large company for their dedication to promoting our mission in their workplace through employee volunteerism and raising at least \$50,000 for our campaign. This company has also met requirements for the Circle of Honor.

### Champion of Hope

Our Champion of Hope award is the highest honor a company can receive. This company demonstrates their commitment to the community by raising \$100,000 or more in campaign. This company also meets the requirements for the Circle of Honor.

## CIRCLE OF HONOR

The Circle of Honor award encompasses those whose campaign demonstrated employee support specifically to the Community Fund and to internal corporate goals.

### Non-financial Contributions (must do 3):

- Employees volunteered for United Way or a United Way partner agency
- A special event was held during Campaign to raise funds and awareness.
- ECC attended Campaign training
- Involvement with United Way was promoted to customers, suppliers, and other audiences (i.e. newsletter, website, etc.)
- United Way was provided with donors' names and addresses/emails so employees can be properly thanked

### Giving (at least 3 of the following):

- Gifts specific to United Way of Yellowstone County's Community Care Fund totaled at least 50% of total employee giving.
- The average employee gift was at least \$50
- At least 51% of the total number of employees made an annual donation to the Campaign.
- The company made a corporate contribution to United Way of Yellowstone County.
- CEO gave a leadership level gift (\$1,000+)
- The company made an in-kind donation to United Way of Yellowstone County for a Collection Drive or the CommUnity Rally.



# FREQUENTLY ASKED QUESTIONS

## What does UWYC do?

United Way works to improve the health, education, and financial stability of every individual in Yellowstone County. With the help of our neighbors, we identify our community's biggest needs and develop strategies and partnerships to tackle major issues, including:

- Lack of affordable after-school care through our CARE Academy and Discover Zone sites.
- Targeted support for new parents or parents of young children through the work of our Best Beginnings Coalition.
- Addressing homelessness and substance abuse through the Continuum of Care Coalition.
- Increasing attendance and graduation rates through our Attendance Matters Initiative.
- Provide resources through Montana 2-1-1.

## Where does my donation go?

- Right back to our community! United Way has locations all around the world, but each United Way is set up to serve the needs of their own community. That means when you give to UWYC, you are helping build a brighter future for your neighbors in Yellowstone County. **All donations stay local** to support the programs, partnerships, and collaborations that our staff, board, supporters, and YOU depend on.
- Of each dollar donated, 90% goes to programs, 5% goes to additional fundraising, and 5% supports operations.
- UWYC adds value to your donation. By marshalling volunteers, doing additional fundraising, collaborating with other non-profits and businesses, and operating our own programs, we put almost four times as much value back into our community as we take in through fundraising.



## MULTIPLIER EFFECT

FOR EVERY \$1  
DONATED

WE GIVE BACK

\$4.57 TO OUR LOCAL  
COMMUNITY

**\$712,950 Campaign dollars raised**

• Value of total Volunteers hours totaled	\$129,847
• Inkind and donated supplies	\$20,000
• Allocations to Partner Agencies	\$250,000
• Donated to Nonprofit through designations	\$114,913
• Additional Local Community Support	\$1,932,760
• CARE Academy	\$811,040

**\$3,258,560 invested in the community**



## Are donations to United Way tax-deductible?

- Yes. All donations will receive a receipt (emailed under \$100; mailed over \$100).

## When does payroll deduction start?

- Payroll deduction usually runs from January 1st – December 31st, however, United Way does not set your payroll schedule; it is a company decision.

## When should our Campaign run?

- Most Campaigns take place from September to December but they can occur any time that is best suited for your organization.

## How long should our Workplace Campaign run?

- The average campaign runs for 2-4 weeks.
- Two weeks is generally a sufficient amount of time to kick off your campaign, get the message out effectively, and make your ask without overburdening the staff.

## Can employees designate their own donation?

- As a service to donors, we make it possible to specify a non-profit program to receive your donation. However, the direct investment of your dollars given to UWYC works to strengthen education, income, and health – the building blocks of opportunity – in Yellowstone County.

## Who do I contact for help or more information?

- Our Director of Community Relations, Steph Brazill, would love to hear from you!
  - [communityrelations@uwyellowstone.org](mailto:communityrelations@uwyellowstone.org)
  - 406.272.8510

## THANK YOU

Thank you in advance for your efforts! By agreeing to lead your company's Campaign, you join a passionate group of donors, volunteers, and advocates making a difference in Yellowstone County.

You are a frontline volunteer who raises awareness about the vital role that UWYC plays in our community. Together, with passionate supporters like you, we are leading the charge to improve lives in Yellowstone County.