**What to Know:**

* Who is your United Way representative? (link email)

Stephanie Brazill, Director of Community Relations

communityrelations@uwyellowstone.org

406-272-8510

Kim Lewis, President and CEO

Klewis@uwyellowstone.org

406-272-8501

* Date of your campaign – Confirm with your Leadership
* Campaign type – In-person, Virtual, or hybrid campaign?
* Confirm how you make a pledge
	+ UWYC will set up your unique company landing page with electronic pledge forms and options for online credit card gifts.
	+ Payroll deduction available? Remember, the pledge is king! Special fundraising activities are super fun, but the most powerful way people can support the United Way Community Fund is by making an easy payroll deduction pledge – it’s the gift that keeps on giving all year!
	+ Corporate match? Determine if your company will be making a contribution to United Way and/or if they will match employee contributions.

**Best practices and things you’ll need from your workplace to succeed:**

* **Get support from your organization’s CEO-** Engage top leader/CEO – ask for their personal support – will they share “Why I give” or make the first pledge? (Top-down campaigns have the best results!)
* **Contact list** with names and work emails for all employees
* **Helpers** – Engage with a campaign team/committee; recruit lots of hands to help with the campaign (Tip: 1 helper for every 25 employees, you may want technically savvy people on your team to help facilitate online activities, presentations, meetings, and more. Connect with HR/payroll to confirm withdraw dates, process and reporting. Pull in marketing and communications team members to help craft your communication plan (example email templates found [HERE](https://uwyc.sharepoint.com/Shared%20Documents/data/CAMPAIGN/2024/UWYC%20Campaign%20toolkit%20and%20resources/ECC%20-%20Email%20templates/UWYC%202024%20Leading%20the%20Way-%20Workplace%20Campaign%20Toolkit%20-%20Donor%20Email%20Templates.docx)) Ask young professionals or affinity groups to help, too.
* Review results and notes from past year/s then **set a goal**
	+ Participation goal? Community Fund goal? Set a stretch goal to top previous results.
* Develop your campaign plan
	+ Determining your campaign dates, be sure to let your United Way rep know. Workplace giving Campaign typically runs from September through November. You can run your campaign for two weeks or extend it throughout the year. We are here to support you in creating a customized campaign that fits the unique needs of your organization or company.
	+ Make a communication plan
		- What info will you use
		- When will it be shared/sent
		- Where will information be displayed
		- How will you deliver information and pledging opportunities
* Attend our **training** sessions – they’re fun, interesting, and will prepare you for success (Register for Employee Campaign Coordinator training session [HERE](https://www.unitedwayyellowstone.org/form/employee-campaign-coordinator-re)) Plus you will meet other business leaders with similar passions for our community.

**Things you’ll need from United Way of Yellowstone County:**

* **Presentation** - Invite your United Way representative to give a short presentation – set dates/times. We would love the chance to share stories and support YOUR United Way campaign efforts. We can call into any/all existing staff meetings or join a campaign specific meeting. Just invite us to join either in person or virtually!
* What types of **promotional material** do you need? Posters? Digital? Eblasts? Other? Any special needs? Visit our Workplace Giving Campaign page [HERE](https://www.unitedwayyellowstone.org/workplace-giving-campaign) for more information.
* **Plan a volunteer activity** to illustrate your dollars at work.
* **Top Leadership** – confirm they will deliver a short “Welcome!” or “Why I give” or other personal promotion, plus commit to make the *first* pledge during the campaign kickoff. To make it easy, we’ve included an email template for your CEO or top leadership to use [HERE](https://uwyc.sharepoint.com/Shared%20Documents/data/CAMPAIGN/2024/UWYC%20Campaign%20toolkit%20and%20resources/ECC%20-%20Email%20templates/additional%20email%20template%20examples-%20need%20to%20be%20formated%20to%20align%20wtih%20UWYC/Call%20to%20action%20from%20your%20CEO%20or%20top%20leadership%20to%20engage%20staff%20participation.docx).
* **Get social** – determine what platforms you will use to highlight your efforts with your followers.

**Plan for success – Inform and educate your staff:**

* Confirm dates/times for your United Way representative to give a short presentation *(*[*2024 Workplace Giving slide deck*](https://uwyc.sharepoint.com/Shared%20Documents/data/CAMPAIGN/2024/Campaign%20Presentations/2024%20Workplace%20Giving%20Campaign%20Presentation.pdf)*)* This is the most effective way to launch your campaign!
* Planning timeline to include:
* Promote campaign early – 2-3 weeks before campaign, start promoting the event – let everyone know what’s coming, and when. Send “Campaign is Coming Soon!” communications – let your organization know when you’ll be running your campaign – emails, social blasts etc. with increasing frequency 2-3 weeks before kicking off
	+ **Send again** – “Coming Soon!” reminder the week before campaign kickoff
	+ Include information about the need in the community, how your support helps meet that need, the work and why giving is important – ***Your United Rep has this information – Just Ask!*** You can find United Way of Yellowstone County’s most recent Community Impact Report [HERE](https://uwyc.sharepoint.com/Shared%20Documents/data/CAMPAIGN/2023/Annual%20Report/2022-23%20Community%20Impact%20Report.pdf).
	+ Plan kick-off event/meeting/activity for quick start, include multiple ways to engage your staff, check out our FUN(d)raising ideas [HERE](https://uwyc.sharepoint.com/Shared%20Documents/data/CAMPAIGN/2024/UWYC%20Campaign%20toolkit%20and%20resources/Campaign%20Landing%20Page/Visual%20Assets/%28FUN%29DRAISING.pdf).
	+ Set date to deliver CEO’s “Why I give” message**.**
	+ Schedule timing of “counting down to campaign” and other communications, info/emails/social etc.
	+ Will you have a special event or fun activity during campaign?
	+ Plan final wrap up date/time, and tie to celebrate results.
	+ Schedule debrief with your United Way rep, set a time to review your pledge report.
* Make it FUN!

**Campaign time:**

* Send your preferred corporate logo to your United Way rep. (high resolution/jpeg or png)
* Start Communicating! Get the word out to your staff! Let them know campaign is coming, dates, and goals
* Bring campaign to life in your physical workspaces – have our colorful promotional/educational posters, signage, and other displays installed on the day you kick off your campaign. Consider employee entry locations, lobbies, lunchrooms, common areas, cafeterias, and even restrooms! Download your campaign supplies by visiting our [online toolkit](https://www.unitedwayyellowstone.org/workplace-giving-campaign) or ask your United Way rep

**Campaign Kickoff:**

**Day 1 –** first thing in the statement and out an email or quote from your CEO or highest-ranking local leader kicking off your United Way of Yellowstone County campaign, stating he/she made a gift with a “Why I gave” statement, and encouraging all employees to give. Include a link to your campaign landing page, campaign dates and if you’re hosting a special online or in-person event now is a great time to include a schedule**.**

* Stay in regular contact with your UWYC rep
* Send daily updates, hot topics, etc. to your staff-You’ll have access to our [campaign toolkit](https://www.unitedwayyellowstone.org/workplace-giving-campaign) and [customizable email templates](https://uwyc.sharepoint.com/Shared%20Documents/data/CAMPAIGN/2024/UWYC%20Campaign%20toolkit%20and%20resources/Leading%20the%20Way%20-%20ECC%20Email%20templates/UWYC%202024%20Workplace%20Campaign%20Toolkit%20-%20Donor%20Email%20Templates.docx). They include success stories, community needs details, and much more. We HIGHLY recommend you use these!
* We encourage companies to utilize a customized landing page featuring their logo and an electronic pledge form for a seamless and eco-friendly experience (we recommend sending an email the night before you kickoff with instructions on payroll withdraw, recurring credit or debit card donations or one-time donations)
* Have FUN! – check out our list of [FUNdraising](https://uwyc.sharepoint.com/Shared%20Documents/data/CAMPAIGN/2024/UWYC%20Campaign%20toolkit%20and%20resources/Campaign%20Landing%20Page/Visual%20Assets/%28FUN%29DRAISING.pdf) event and activity suggestions.
* Give social media shout outs!
* Mid campaign - How close are you to reaching your goal? Number of new donors, etc? Keep your team motivated! Consider sone sort of challenge to get those that haven’t given yet motivated to give. If your goal is met, perhaps your CEO could dye their hair a crazy color, take a pie in the face make a lip sync video for all employees to see, or walk through the office in a crazy get-up!
* Keep energy high all the way through the last day of your campaign. Add a fun count down at the three days to go mark to encourage last minute donations include the company landing page/QR code.
	+ **LAST MINUTE** push! Click [HERE](https://uwyc.sharepoint.com/Shared%20Documents/data/CAMPAIGN/2024/UWYC%20Campaign%20toolkit%20and%20resources/ECC%20communications/Leading%20the%20Way%20-%20ECC%20Email%20templates/Reminder%203.docx) for reminder email template.
	+ Final day to pledge communication to all.
* Personal thanks to individual donors as they pledge (Thank you 1. email template [HERE](https://uwyc.sharepoint.com/Shared%20Documents/data/CAMPAIGN/2024/UWYC%20Campaign%20toolkit%20and%20resources/ECC%20communications/Leading%20the%20Way%20-%20ECC%20Email%20templates/Thank%20you%201.docx) , thank you 2. Email template [HERE](https://uwyc.sharepoint.com/Shared%20Documents/data/CAMPAIGN/2024/UWYC%20Campaign%20toolkit%20and%20resources/ECC%20communications/Leading%20the%20Way%20-%20ECC%20Email%20templates/Thank%20you%202.docx).

**Post Campaign:**

* Complete Campaign Summery Report ([Campaign Report Form](https://www.unitedwayyellowstone.org/form/campaign-report))
* Announce and celebrate results
* Thank leadership – thank donors – thank your team
* Debrief with your United Way representative – what went well? Ideas for next year? Supplies or forms picked up?
* Pat yourself on the back for a job well done! Because of YOU and YOUR efforts low-income children and families in need all across our community will receive the support they need to have better lives. **YOU ROCK!!**

**What’s Next?**

* *Keep the information, engagement, motivation, and connections going throughout the year!*
* *Stay involved: sign up for emails* [*HERE*](https://www.unitedwayyellowstone.org/sign-our-newsletter)*, attend engagement sessions, plan a volunteer project, join a committee (Volunteer opportunities* [*HERE*](https://www.unitedwayyellowstone.org/volunteer)*)*