



# 2022 CAMPAIGN GUIDE

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United Way  
of Yellowstone County

IMPORTANT CAMPAIGN DATES		
8/8/2022	ECC Training*	<i>Breakfast 8:30am</i>
9/8/2022	ECC Monthly Check-In	<i>Virtual - 11:00AM</i>
9/15/2022	Campaign Kick-off*	CommUnity Rally, Day of Caring, Operation Supply
10/13/2022	ECC Monthly Check-In	<i>Virtual - 10:00AM</i>
11/3/2022	Thankful Thursday*	<i>4:30pm-6:30pm</i>
11/10/2022	ECC Monthly Check-In	<i>Virtual - 9:00AM</i>
1/23/2023	Campaign Celebration	Hooligans- 4:00pm
3/23/2023	Community Leaders Lunch	<i>11:30am-1:00pm</i>
4/6/2023	Thankful Thursday*	<i>4:30pm-6:30pm</i>

\*Events will be held at United Way Office, 2173 Overland Ave.

# 2022 CAMPAIGN CALENDAR

# TIMELINE TO A SUCCESSFUL CAMPAIGN

## BEFORE CAMPAIGN

- ☐ Set Campaign dates. Allow plenty of time to create customized messaging and to get your pledge form/online donation procedure set.
- ☐ 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.
- ☐ Set a campaign goal that your Campaign Team and employees can rally behind.
- ☐ Set key dates for distributing company-wide messaging (i.e. announcement of the campaign, launch day, mid-campaign, final push, and acknowledgement/appreciation).
- ☐ Consider Company Guidelines and the best practices for *your* company (consult with parent companies, HR/Legal teams, vendors, labor unions, etc.).

## DURING CAMPAIGN

- ☐ Use your planned messaging to launch your campaign. Consider using video messages from your organization's leadership to encourage donations and make sure to check out all of the resources in the [Campaign Toolkit](#).
- ☐ Send messaging throughout the Campaign on a company-wide level.
- ☐ Run team challenges to encourage participation
  - See our [Fun\(d\)raising Guide](#) for fantastic ideas!
- ☐ Utilize the Campaign Team members to keep the Campaign top of mind on team conference calls or personal ask emails. Conduct regular calls with the 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.

## AFTER CAMPAIGN

- ☐ Finalize Campaign results. Submit any payroll deduction information to your HR or payroll processing department. Turn in your final report to United Way of Yellowstone County.
- ☐ Consider sending a note of appreciation to the entire company.
- ☐ Thank your Campaign Team and celebrate your results!

# PICK YOUR DONATION STRATEGY



## PLEDGE CARDS

- ☐ Pledge cards provided by United Way are available for your Campaign Team to make your payroll donations.
- ☐ Pledge cards are available as digital webforms, fillable PDF's, and physical forms.
- ☐ Online pledge cards will be available and larger companies will have their own QR code landing page on our website to make it easier to give!

## DIGITAL OPTIONS

- ☐ Use our easy and secure payment portal to make your one-time or recurring donation:
  - <https://www.unitedwayyellowstone.org/civcrm/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**



## 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!





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

# BEST PRACTICES

## Utilize Available Resources

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

## Communications

- Consolidate and coordinate outgoing communications to avoid overwhelming your employees.
  - We provide 5 prepared emails to get you started.
- 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). Consider phone calls instead of emails as well. 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.

## Events

1. Encourage employees to participate in virtual volunteer opportunities either on their own or as a company.
2. 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. Your United Way contact can provide you with messaging and discussion points for these events.
3. 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.

# CAMPAIGN AWARDS

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

#### 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 to Operation Supply Drive or other

# 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, as well as partnerships, to tackle major issues.
  - Issues we are currently working on:
    - 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 problems through the Continuum of Care Coalition.
    - Increasing attendance and graduation rates through our Attendance Matters Initiative.
    - Provide resources through Montana 2-1-1.

## If I donate to UWYC, where does my money 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.
- 84% of every dollar donated is directed to our impact initiatives.

### FOR EVERY DOLLAR DONATED:

- \$0.84 IS DIRECTED TO PROGRAMS
- \$0.06 ADVANCES FUNDRAISING EFFORTS
- \$0.10 COVERS OPERATING COSTS



## THE MULTIPLIER EFFECT

Multiply your generosity with UWYC!  
When you give to United Way of Yellowstone County:

**\$1=\$3.87**

2021 Campaign Dollars Raised:

**\$703,071.00**

UWYC Gave Back to the Community:

**\$2,722,276.44**

## 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 Communications & Campaign Coordinator, Kelsie Verlin, would love to hear from you!
  - [campaign@uwyellowstone.org](mailto:campaign@uwyellowstone.org)
  - 406.272.8504

*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.