

2024 Workplace Giving Campaign Guide



TABLE OF CONTENTS

1

**CAMPAIGN
DATES**

2

**CAMPAIGN
TIMELINE**

4

**DONATION
STRATEGY**

5

**SETTING
GOALS**

6

**BEST
PRACTICES**

7

**CAMPAIGN
AWARDS**

8

**FREQUENTLY
ASKED
QUESTIONS**



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



TIMELINE TO A SUCCESSFUL CAMPAIGN

BEFORE CAMPAIGN

- Set Campaign dates (Usually 2 weeks prior to launch notify UWYC staff, to 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 email messaging throughout the Campaign on a company-wide level (samples on website).
- 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!



PLEDGE CARDS

- Customized, online e-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! *This is the easiest and preferred method!*
- Paper pledge forms can be available upon request.
-

E-PLEDGE CARDS

- 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



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.

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 if your company could match 1:1 or 1:2)		
Other Fun(d)raisers & Events		\$
TOTAL WORKPLACE GOAL		\$

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

COMMUNICATIONS

- Consolidate and coordinate outgoing communications to avoid overwhelming your employees.
 - We provide sample email messages 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.
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 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
- 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 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, 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.

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 straight 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.

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
 - 406.272.8510

THE MULTIPLIER EFFECT

Multiply your generosity with UWYC!



When you give to United Way of Yellowstone County:

\$1=\$3.95

2022 Campaign Dollars Raised:

\$769,614

UWYC Gave Back to the Community:

\$3,037,234

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.