

HOW TO ROCK YOUR CAMPAIGN



UNITED WAY
of Yellowstone
County

THANK YOU FOR STEPPING UP FOR OUR COMMUNITY



FIRST, LET'S BE CLEAR ABOUT SOMETHING: YOU'RE AWESOME

You've volunteered to help fund work in Yellowstone County that helps people on the streets find housing, kids succeed in schools, and families navigate financial and emotional crisis. This kind of work takes a village; we're excited that you stepped up as a leader, and we're here to help you on this path.

OUR IMPACT AREAS: WHAT FITS YOUR BUSINESS?



What is your workplace passionate about? To build a successful workplace campaign, let's tap into that passion. Will literacy and education resonate with your employees? We can focus on building futures. What about topics like mental health or housing? Community Resiliency could be a great fit. Or maybe you want to wider view of our work – campaign messaging could include all three impact areas.

Once we select an impact area focus, we can work together to building campaign messaging that will get your colleagues excited about helping Yellowstone County thrive.

TIMELINE TO A SUCCESSFUL CAMPAIGN

BEFORE CAMPAIGN

- Set Campaign dates and goals. Coordinate with UWYC staff to create customized messaging and to finalize your donation procedure set. Review last year's results and examine what messaging was most effective.
- Recruit a Campaign Team to help distribute Campaign messaging across each department or team. Use employee's expertise; for example, marketing employees can help with communications, and payroll with confirming processing dates.
- 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.
- Create a communications plan. Gather a contact list with names and work emails. Map out messaging about campaign rollouts, kickoff events, mid-campaign updates, a final push, and thank you's. Promote you campaign 2-3 weeks before it launches, and send out follow-ups as launch approaches.



DAY 1: CAMPAIGN LAUNCH

- Use your planned messaging to launch your campaign. Consider using a statement from your organization's leadership to encourage donations and make sure to check out all of the resources in the [Campaign Toolkit](#).
- Plan a campaign kickoff event set a high-energy tone. Check out our [FUN\(d\)raising ideas](#) (link). Consider a presentation from UWYC staff.

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.
- 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.
- Change it up. Consider adding a wacky challenge, like your CEO dying their hair a crazy color if a goal is met.



FINAL PUSH & POST-CAMPAIGN

- Consider a countdown to the final day of campaign featuring fun event or prize.
- Use your goal. Are you close? Or have you already beat it, and could set a new one?
- Finalize Campaign results. Submit any payroll deduction information to your HR or payroll processing department. Turn in your Campaign Summary Report [electronically](#) or [on paper](#).
- 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?





LANDING PAGES

- Your company's landing page is a great resource to collect donations through e-pledge cards
- Donations forms are embedded along with customizable information about United Way of Yellowstone County's impact in the community.
- Employer-specific portals that emphasize the connection between your business and UWYC
- Include any business-specific notes about the donation process
- Easy access to campaign results to coordinate with your company's payroll department

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.

SPECIAL EVENTS

- Make an event your own! Cook up a bake sale or chili cook-off, gain momentum with a bowl-a-thon, or dress for success with Jeans Day. Remember our [\(Fun\)raising ideas!](#)
- Set the ground rules: Expenses, liability, and any administration costs for an event fall on the business. Official campaign events also must direct all proceeds to United Way of Yellowstone County. And remember the really big rules; events like informal Bingo are great, but illegal backroom blackjack tables are out.
- Funds can be submitted through your company's landing page, or by separate cash or check payment. Let your UWYC contact know who donated and help us get in touch to 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		\$

CAMPAIGN AWARDS

Be recognized as a company that cares about our community.



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 kids and families, especially through our literacy programs.
- Addressing family homelessness through our United to Solve Homelessness program
- Grants to local non-profits that target issues of the greatest need through effective solutions
- Resource connection through Montana 2-1-1.

Where does my donation go?

- All donations stay local.
- 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.

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
- The average campaign runs for 2-4 weeks.

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