

2018 Campaign Action Plan

LIVE UNITED



of the Lewis & Clark Area

Firm Name: _____
Coordinator: _____
CEO/Leadership: _____

Campaign Start Date _____ Campaign End Date _____

Budget Year: _____ to _____ Number of Annual Pay Periods: _____

Payroll Contact: _____

Payroll Email and Phone: _____

Does the campaign currently have an online giving option? () Yes () No

United Way now has a text-to-give platform where employees can sign up for a gift through their credit card or fill out a payroll deduction form! Payroll deduction information will be collected and submitted directly to your payroll representative.

A personalized letter is proven to increase the success of a workplace campaign! Would your HR representative provide a list of employee names (only names) to our team to mail merge a letter for each member of your team? () Yes () No

If no, would you be able to merge a letter internally (provided to you by United Way staff) and distribute it to every member of your team? () Yes () No

Setting a Campaign goal gives your team something to achieve together! Set a dollar amount and a percent for how much of your staff you want to give in 2018 to help boost participation.

Dollar Amount: _____ Percent of Staff Giving: _____

Total Number of Helena Area Employees: _____

There are a lot of exciting changes happening at United Way and its work is shifting. To make coordinating your workplace campaign easy, our staff is prepared to present to your team! We are happy to participate as part of a regular meeting or come in for a special event.

Dates/Times Available for Presentations:

Firm CEO/Leadership Campaign Involvement

- () At presentations
- () In promotional materials (letters, emails, etc.)
- () Approval of Corporate gift/match

Does your campaign include a corporate gift? () Yes () No

If yes, is there a standard gift size?: \$ _____

Does the firm provide a corporate match to employee gifts? () Yes () No

If yes, what ratio (Dollar for Dollar, \$0.50 on the dollar, etc.): _____

If yes, does the corporate amount follow employee designations? () Yes () No

Campaign Kickoff
September 18, 2018
Great Northern Hotel
7:00-8:00 a.m.

Campaign Celebration
February 28, 2019
Helena College, Airport Campus
5:00-7:00 p.m.