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Welcome to the United Way Team!

You are essential to the success of our campaign. Without you, we could not provide the funds necessary to support our community. You will engage co-workers in building a stronger community by planning, organizing, and coordinating a successful United Way campaign.

First time as an Ambassador? Seasoned veteran? Wherever you are on your Ambassador journey, this guide will help you conduct a successful campaign from start to finish. If you have any questions or concerns, please contact United Way staff and volunteers. We are here to help you!

As a United Way Ambassador, you will:

- Work closely with your organization’s leadership
- Develop an effective campaign plan
- Recruit volunteers to assist you
- Hold campaign kickoff and recognition events
- Promote the campaign throughout your organization
- Encourage leadership giving in your campaign
- Thanking your donors and volunteers
- Have fun!

We are looking forward to a great year and building resources to make our community even stronger.

Sincerely,

Susan Hay Patrick, CEO
United Way of Missoula County

Erin Wilkins, Director of Development & Marketing
United Way of Missoula County

Rosie Goldich, Development Manager
United Way of Missoula County
OUR MISSION:
TO BUILD A BETTER COMMUNITY

We are more than fundraisers. We are hand-raisers. We are stop-talking-start-doing-take-on-the-impossible game changers. We lead the way.

We fight for the education, financial stability, and health of every person in Missoula. But change doesn’t happen alone. Together, there’s a way.

When you support United Way of Missoula County, you support programs such as:

- Imagination Library
- 5210 Let’s Move! Missoula
- Zero to Five Missoula
- Reaching Home
- Missoula Nonprofit Center
- Project Tomorrow Montana
- Missoula Disaster Assistance Fund
BUILD YOUR CAMPAIGN PLAN

Start Date:
End Date:
Goal # of employees pledging:

Pledge Collection Type:
- UW Paper Pledge
- Company Portal
- E-pledge
- Company Paper Pledge
- Other:

Who is collecting and/or distributing pledges?

Campaign Committee Members:
1. 
2. 
3. 
4. 

GIVE. ADVOCATE. VOLUNTEER.
HOW TO PRESENT YOUR CAMPAIGN

OPENING REMARKS
- Given by organization’s leadership, United Way staff or volunteer
- Explain organization’s history with United Way

UNITED WAY OVERVIEW
United Way finds innovative ways to address short term individual needs while working on long-term community solutions in the areas of education, financial stability and health

EDUCATION
- Back to School Backpack Program: Ensures that kids in need start off the school year right with backpacks filled with school supplies
- Imagination Library: Increases childhood literacy rates and prepares kids to enter kindergarten through participating children (3,000+) receiving a high-quality, age appropriate book every month to children under age five
- Zero to Five Missoula: Creating a community wide movement to make sure every resident of Missoula County understands the importance of this critical period of life, and then connect parents and caregivers with knowledge, skills and resources to help children thrive

FINANCIAL STABILITY
- 211 and microgrants for individuals & families facing crises
- Reaching Home: Missoula’s 10-Year Plan to End Homelessness - Coordinating efforts across service providers to ensure that homelessness is rare, brief, and non-recurring.

HEALTH
- Project Tomorrow Montana: Raising awareness about suicide in Montana and providing resources to combat suicide in Western Montana
- 5210 Let’s Move! Missoula: Implementing research about physical activity in the classroom across Missoula elementary schools to promote a healthy, active lifestyle. Prescribes 5 servings of fruits and vegetables, less than 2 hours of recreational screen time, at least 1 hour of physical activity and 0 sugary beverages.

COMMUNITY CRISIS RESPONSE
- United Way is able to act quickly and nimbly in times of community crisis, helping people prepare for and recover from disasters. In previous years, United Way has assisted those affected by the Lolo Peak and Rice Ridge Fires and flooding of Missoula neighborhoods.

MAKE THE ASK
- Ask everyone to give to United Way of Missoula County
- If they gave last or in previous years, ask them to increase their giving
  - Medallion Club: Leadership givers who give more than $500 per year, which is just $10 per week!
- Remind employees of the campaign goals that have been set
- Distribute pledge forms
  - Must be filled out each year for tax purposes.
  - Have employees turn in pledge forms as soon as possible or set a deadline. Keep deadline firm!
  - Pink copies are for employees to keep, White copies are for your organization, and please return the Yellow copy to a United Way staff person.
TIPS FOR A SUCCESSFUL CAMPAIGN

TANGIBLE GOALS allow for transparency and a clear plan of action.

SUPPORT from your organization’s leadership is critical. Ask your leadership to speak at the kickoff event, employee presentations, or write a letter stating the organization’s history with United Way.

PERSONALIZE. A personal ask is always best. United Way of Missoula County has personalized pledge forms that you can send out after campaign kickoff.

PROMOTE. PUBLICIZE. PLAN. Promote and publicize the campaign through correspondence with staff and leadership and social media postings (see Campaign Communications). Plan by setting deadlines and sticking to them (See Campaign Timeline & Checklist)!

ASK. Distribute pledge forms after the kickoff presentation.

CELEBRATE! Acknowledge those who are participating and helping with the campaign.

HAVE FUN! Make presentations and events fun for all - use engaging incentives and healthy competition to entice your coworkers to participate.

ONLY HAVE 60 SECONDS FOR YOUR PRESENTATION?

BE AN ADVOCATE:

• United Way recruits people and organizations who bring passion, expertise, and resources needed to get things done.

• Giving to United Way’s LIVE UNITED fund is the most efficient and powerful way for you to invest in our community.

• United Way is not a short-term investment; it is about lasting change. We work together to address our community’s most critical problems for the long term.

• United Way is:
  
  • EFFECTIVE: We only invest in programs with results that are measurable, sustainable, and meet current community needs.
  
  • EFFICIENT: Donor gifts are leveraged with others to meet the most pressing needs in our community.
  
  • LOCAL: We have been investing in the Missoula community since 1931 and also serve Mineral and Ravalli counties.
# CAMPAIGN GOAL SETTING

## LAST YEAR’S CAMPAIGN RECAP

<table>
<thead>
<tr>
<th>Category</th>
<th>Last Year’s Value</th>
<th>This Year’s Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Donors</td>
<td></td>
<td></td>
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<tr>
<td>Employee Participation Rate</td>
<td></td>
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<tr>
<td>Average Employee Gift</td>
<td></td>
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<tr>
<td>Total $ Employee Gifts</td>
<td></td>
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<tr>
<td>Corporate Gift</td>
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<tr>
<td>$ Raised from Special Events</td>
<td></td>
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<tr>
<td>Number of Medallion Donors</td>
<td></td>
<td></td>
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<tr>
<td>Number of Staff Educated about United Way</td>
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## THIS YEAR’S CAMPAIGN GOALS

<table>
<thead>
<tr>
<th>Category</th>
<th>This Year’s Value</th>
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<tbody>
<tr>
<td>Number of Donors</td>
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<td>Number of Staff Educated about United Way</td>
<td></td>
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What are some unique ways that you can engage your staff during your organization’s United Way campaign? These events can help you reach your special events goal, which is separate from your annual gift.

- Jeans/Casual Day
- Ice Cream Social
- Parking Spot Raffle
- Cutest Pet Contest
- Holiday Gift Wrapping
- Office Bake Off
- Costume Contest
- Desk Bingo
- _________________
- _________________
- _________________
- _________________

Volunteering with United Way is a great way to engage and educate employees at your organization about United Way. Here are some events during the year that you and your staff can participate in. If you are interested, please contact United Way of Missoula County!

- Back to School Backpacks
- Suicide Prevention Week
- University United Food Friday
- Warm Hands, Warm Hearts Clothing Drive
- Project Community Connect
- Day of Action
- Project Employment Connect
How are you planning on sharing your organization’s campaign?
With your campaign team, fill in the chart below to create a Campaign Communications Plan.

<table>
<thead>
<tr>
<th>CAMPAIGN COMMUNICATIONS PLAN</th>
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<tbody>
<tr>
<td>What is the subject of your communication?</td>
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#SHAREYOURCAMPAIGN

Use these sample social media posts to help share the word about the work your organization is doing to support United Way!

- [YOUR COMPANY NAME] has raised [INSERT DOLLAR AMOUNT] in our 2019 @UnitedWayMissoula campaign! Thank you to all our employees who are giving back to the Missoula community. Together we #LiveUnited.
- This week, we start supporting @UnitedWayMissoula with our 2019 campaign. It takes all of us giving what we can to support our Missoula community in need. Together we can #LiveUnited.
- We proudly support @UnitedWayMissoula in the fight for health, education, and financial stability of all Missoulians. Together we can #LiveUnited.

Tips & Tricks for Social Media
- Get visual: Use pictures or video of your employees and coworkers to tell why they support United Way of Missoula County.
- Tag, we’re it: Make sure to use United Way hashtags and tag United Way of Missoula County so we can share the progress of your campaign!
- Utilize United Way Worldwide videos, photos, blog content and stories to help showcase your company.

EDUCATION
- @DollysImaginationLibrary helps all children become kindergarten ready. That's why we support @UnitedWayMissoula giving books to over 3,000 children in Missoula & Mineral Counties.
- Zero to Five Missoula is a community wide movement to make sure everyone understands how critical a child's development is during this period. @UnitedWayMissoula wants all children to have the healthiest start in life.

FINANCIAL STABILITY
- We are supporting @UnitedWayMissoula in our 2019 campaign because they believe all Missoulians should have access to reliable housing.
- @UnitedWayMissoula is the leading partner of Reaching Home: Missoula's 10 Year Plan to End Homelessness. We are supporting @UnitedWayMissoula in our 2019 campaign because no Missoulian should be left in the cold.

HEALTH
- 5-2-1-0 teaches that all children should eat 5 fruits and vegetables, less than 2 hours of recreational screen time, 1 hour of physical activity, and 0 sugary drinks every day. We support @UnitedWayMissoula in making our children healthier!
- Montana has one of the highest rates of suicide in the country. Project Tomorrow Montana shows us that by working together, we can create a better tomorrow for Montanans at risk of suicide.
#SHAREYOURCAMPAIGN

Receiving support from your organization’s CEO or leadership is critical to gaining the support of your coworkers and the success of your United Way Campaign. Want more examples of correspondence? Visit missoulaunitedway.org/campaign-toolbox today!

Dear [insert employee name],

Welcome to [your organization’s name]’s employee giving campaign to support United Way of Missoula County! [Your organization’s name] has been supporting United Way for over XX years. Last year, we raised $XX and hope to surpass that number this year by raising $XX. We will be kicking off our campaign on [date of event] at [location of event]. I hope you can join us in supporting United Way.

United Way of Missoula County builds a better community for all, specifically in the areas of education, financial stability and health, which are building blocks for a healthy life and community. United Way convenes partners across many sectors to identify issues facing the community as a whole and implement long-term, effective solutions and strategies for success.

Serving Missoula, Mineral and Ravalli Counties, United Way administers many programs that you may be familiar with, such as Imagination Library, Project Tomorrow Montana, 5-2-1-0 Let’s Move! Missoula, and more. Over the next few months, you will have the opportunity to learn more about the impact United Way of Missoula County is having on our friends, neighbors, colleagues and community.

United Way has served our community for the past 87 years, largely thanks to the support from donors who give during employee giving campaigns. I hope you will join me in supporting our community through a gift to United Way. By doing so, you will help far more than one person or program. You, along with hundreds of others, will help achieve real results in the areas of education, financial stability, and health.

Your generosity and involvement matter. Together, we can create opportunities for a better life and brighter future together. We can #LiveUnited.

Sincerely,

[your organization’s leadership]
# Campaign Timeline and Checklist

<table>
<thead>
<tr>
<th>4 Weeks Before</th>
<th>2 Weeks Before</th>
<th>Kick off Celebration!</th>
<th>Post Campaign</th>
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<tbody>
<tr>
<td>- Recruit and train a campaign team&lt;br&gt;- With campaign team, develop theme, goal, incentives and special events&lt;br&gt;- Gather United Way promotional and educational materials, including print and online&lt;br&gt;- Meet with CEO or organizational leadership&lt;br&gt;- Review previous campaign performance</td>
<td>- Execute campaign theme through newsletters, emails, signage&lt;br&gt;- Receive pledge forms and campaign materials from United Way&lt;br&gt;- Engage your CEO or organizational leadership through a Leadership Giving Campaign&lt;br&gt;- Invite United Way staff to come talk</td>
<td>- Make sure employees receive all materials and have the opportunity to give&lt;br&gt;- Regularly update staff and organizational leadership on campaign results&lt;br&gt;- Send out reminders on a routine basis</td>
<td>- Wrap up campaign and collect all outstanding pledge forms&lt;br&gt;- Submit campaign reports to United Way staff&lt;br&gt;- Share campaign results with your coworkers!&lt;br&gt;- Thank all contributors!</td>
</tr>
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**Target Date:**

What else do you think should be on your Campaign Timeline and Checklist?
UNITED WAY TERMS:
WHAT DO THEY MEAN?

LIVE UNITED FUND: United Way’s LIVE UNITED Fund is the most powerful way to invest your donation. Your gift to United Way’s LIVE UNITED Fund ensures that your donation is invested where the need is greatest. Volunteers monitor donations to ensure the programs are effective, meet current community needs, and are financially stable and sustainable.

DESIGNATION: A designation is a gift directed to a specific agency or program by the donor. United Way honors all donor designations between $50 and $5,000 to qualified 501c3 organizations. However, we believe that the most powerful way to invest your donation is to donate to our LIVE UNITED Fund.

LEADERSHIP GIFT: An annual contribution of $500 or more to United Way of Missoula County is considered a leadership gift. Individuals who contribute $500 or more annually become members of our Medallion Club. Individuals who contribute $10,000 or more annually become members of our Tocqueville Society. Members of these groups receive special recognition and invitations to exclusive events.

LOYAL CONTRIBUTOR: A donor who has given to United Way for at least five years is considered a loyal contributor. This group receives special notes and emails in appreciation of their long-term commitment.

PACESETTER: Workplaces that set the giving pace for our campaign by launching their campaigns prior to the Kickoff in September and completing campaigns before the Thank You celebration in November.
FREQUENTLY ASKED QUESTIONS

CAN I DESIGNATE MY GIFT TO A SPECIFIC CHARITY?

United Way of Missoula County honors designations above $50 to a qualified 501c3 organizations, although we believe that the most powerful way to invest your donation is to donate to our undesignated LIVE UNITED Fund. Designating a gift often means that there are fewer dollars for supporting United Way programs. Also, in order to cover the cost of administering a pledge processing fee is applied to every designated donation.

WHERE CAN I REFER PEOPLE FOR IMMEDIATE HELP?

Call 211 for the best source of information on where someone in need can get referrals for essential services like food, shelter, clothing, and health care. 211 can be dialed from most phones; if your carrier does not allow 211 access, call 406-549-5555.

HOW MUCH OF MY DONATION STAYS IN MISSOULA?

Like all United Ways across the nation, United Way of Missoula County is, and always will be, a local organization. Your donation stays local and helps people in our service area of Missoula and Ravalli Counties, and one program in Mineral County. United Way Worldwide serves as a trade association for its 1,800 members. We pay the national office 1% of our total assets annually. In exchange, United Way Worldwide provides us with important training and networking opportunities, valuable research information, national marketing and advertising materials, and at least $20,000 in corporate donations solicited on the national level, including from national corporations operating in our area (Target and UPS, for example). We are a strong, local United Way in part because of the advice and resources available to us from United Way Worldwide’s national headquarters.

For any more questions on how your organization can support or volunteer with United Way, please contact United Way of Missoula County at 406-549-6104.
UNITED WAY OF MISSOULA COUNTY

CONTACTS & RESOURCES

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Martin Rogers, Worden Thane PC
Mark Thane, Community Member
Holly Truitt, Community Member
Jason Williams, Blackfoot

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