On behalf of our community, thank you so much for helping lead your organization’s United Way of Metro Chicago campaign this year. We are grateful for your leadership and excited about all that is in store this year. You are joining a team of dedicated staff and thousands of volunteers around the region as we work together to make Chicago a thriving place that every person in every neighborhood is proud to call home.

This guide is full of best practices used by hundreds of campaign leaders like you around the Chicago area to run best-in-class workplace campaigns. We use these guidelines ourselves at BMO, and our employees find them useful for creating engaging experiences. I strongly encourage you to connect with your United Way representative, to assist you in planning your United Way campaign.

I also invite you to take some time to review this year’s campaign messaging. I am inspired by United Way’s evolving approach to strengthening neighborhoods, and I think you will be too. United Way brings businesses, government, nonprofits, community leaders, and donors together to tackle the systemic issues that have afflicted our region in an unprecedented way. Together, we are helping individuals and families receive the tools necessary to reach their full potential – a quality education, living-wage job, affordable healthcare, and access to basic needs.

We are all working together to create communities where children and families can thrive. Thank you for joining us.
5 STEPS TO RUNNING A SUCCESSFUL CAMPAIGN

1 | LEARN

Before planning, we want to understand you and your goals and tell you more about our impact.

- **Call your United Way representative to get started.**
  They will help you create and manage a successful campaign.
- **If you don’t know who your contact is, call us at 312.906.2204 or email help@LIVEUNITEDchicago.org**

2 | PLAN

The keys to campaign success are preparation and teamwork. Having the right group of campaign volunteers will increase the success of your campaign and make your role much easier.

- **Set campaign goals**, objectives and a timeline.
- **Identify and recruit your team.**
- **Learn about various strategies to make your campaign fun and engaging. Call us, we have lots of ideas!**

3 | INSPIRE

Your campaign impacts real lives, and we can help you share those stories.

- **Promote your campaign.** Get your marketing and communications team involved! It may take more than an all-staff email.
- **Help staff see the impact their gift creates by hosting a United Way Day of Action or an onsite Care Project, or ask us about United Way Affinity Group opportunities.**
- **Share your own personal story** about why you support United Way.

4 | ASK

The number one reason people don’t give is that they were never asked.

- **Kick off your campaign with a fun event featuring an energetic and inspiring ask to give!** Have your company CEO participate by writing a letter or making a speech. CEO commitment and leadership is the #1 predictor of success.
- **Emails work, but peer-to-peer is still the best way to ask for a gift. Talk to us about asks that feel right for your team.**

5 | THANK

- **Let us help you thank your donors.** Remember, we can’t thank them if we don’t know them! Sharing data is encouraged!
- **Review campaign results** with your United Way team.
- **Share the impact!** Publicize the campaign results in your company newsletter, intranet, social media channels or a message from the CEO.
CAMPAIGN LEADER CHECKLIST

12 WEEKS
- Meet with a United Way representative and previous campaign team to review successes and challenges
- Determine campaign dates, length, locations and fundraising goals
- Finalize campaign committee leaders and structure
- Choose Tocqueville Society Affinity Group Ambassadors
- Confirm dates, goals and annual objectives with your United Way representative

9 WEEKS
- Develop campaign theme, calendar of events and incentives
- Recruit additional campaign committee members
- Brief executive leadership on campaign key objectives and secure CEO buy-in
- Develop Tocqueville Society and Affinity Group engagement strategy by identifying prospects and planning events
- Talk to United Way representative about configuring eCampaign platform

6 WEEKS
- Develop communications plan and order campaign marketing materials through your United Way representative
- Visit the Campaign Toolkit at LIVEUNITEDchicago.org/campaign-toolkit to check out campaign resources, tools and templates
- Develop plan to host a Day of Caring and recruit volunteers. Learn more online at LIVEUNITEDchicago.org/volunteer.

4 WEEKS
- Train campaign volunteers and ambassadors. Your United Way representative can assist.
- Build excitement! Share United Way impact stories and videos internally

2 WEEKS
- Share calendar of events and incentives with all staff
- Host Tocqueville Society and Affinity Group events and ask ambassadors to follow up with prospects

KICKOFF!
- Host a kickoff event!
- Invite your CEO and United Way representative to talk about United Way’s impact
- Send an eCampaign welcome email

ONGOING
- Send daily campaign tracking reports
- Track progress and adjust strategies and incentives accordingly
- Send eCampaign reminders
- Host business unit events and kickoffs to raise awareness and increase participation
- Continue sharing United Way impact stories
- Host a Day of Action

AFTER YOUR CAMPAIGN
- Conduct a closeout meeting with your United Way representative
- Send out final campaign fundraising total
- Thank and show appreciation to employees!
CAMPAIGN RESOURCES

RELATIONSHIP MANAGERS
Dedicated United Way staff is available to help plan a best-practice campaign, including the planning and delivery of presentations. If you don’t know who your Manager is, please call us at 312.906.2204 or email help@LIVEUNITEDchicago.org

E-CAMPAIGNS
Replace paper pledge forms with electronic campaign tools. eCampaigns are customized pledging and reporting systems that securely process and track donations according to industry standards. Start yours today! Contact your United Way Representative to learn more.

CAMPAIGN TOOLKIT (PRINT AND DIGITAL)
United Way offers numerous print and digital resources to educate your employees about United Way’s work and the impact of their gift. Find brochures, signage, flyers, videos and more online at LIVEUNITEDchicago.org/campaign-toolkit

AFFINITY GROUPS AND GIVING SOCIETIES
Affinity groups and giving societies are networks of passionate individuals who join forces to advocate, volunteer and generously donate to support the neighborhood-focused work of United Way. Contact your United Way Representative or learn more online at LIVEUNITEDchicago.org/affinity-groups.

EMPLOYEE ENGAGEMENT
We have a variety of ways to engage your employees! Assemble kits as a teambuilding exercise, host a Day of Action, support or attend a signature United Way community or social event, or connect individuals to specific projects using our online Volunteer Calendar. Contact your United Way Representative or learn more online at LIVEUNITEDchicago.org/volunteers

STORIES OF IMPACT
We’re proud to partner with dedicated businesses, nonprofits and community leaders to create neighborhood-level change. To learn more about United Way’s community impact, visit LIVEUNITEDchicago.org/stories. There you can read stories and watch videos highlighting the work happening across the region.

SOCIAL MEDIA
Share your campaign successes by connecting with us on social media! Amplify the lasting impact you’re making across the Chicago region by tagging or mentioning United Way of Metro Chicago when you post on your company and individual social media accounts.

@UNITEDWAYCHICAGO
@UNITEDWAYCHI
@UNITEDWAYCHI
@UNITEDWAYOFMETROCHICAGO