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 About Our Impact**
   - 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 Your Campaign**
   - 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, and identify and recruit your team.
     - Configure an eCampaign platform for a more streamlined donor experience.
     - Learn about various strategies to make your campaign fun and engaging. Call us, we have lots of ideas!

3. **Inspire Co-Workers**
   - 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 your team 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. **Make the Ask to Give**
   - 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 Your Donors**
   - 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.
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.

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Set campaign goals, objectives and a timeline, and identify and recruit your team.

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Configure an eCampaign platform for a more streamlined donor experience.

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Learn about various strategies to make your campaign fun and engaging. Call us, we have lots of ideas!

CORE BEST PRACTICE
 Train any campaign volunteers and ambassadors—your United Way representative can assist
 Build excitement! Share United Way impact stories and videos internally
 Share calendar of events and incentives with all staff

BONUS BEST PRACTICE
○ Choose Tocqueville Society and Affinity Group Ambassadors

STEP 1

KICKOFF YOUR CAMPAIGN

CORE BEST PRACTICE
 Host a fun and engaging kickoff event!
 Invite your CEO and United Way representative to talk about United Way’s impact
 Send an eCampaign welcome email (if applicable)

BONUS BEST PRACTICE
○ Host Tocqueville Society and Affinity Group events and ask ambassadors to follow up with donors

STEP 2

DURING CAMPAIGN

CORE BEST PRACTICE
 Track progress and adjust strategies and incentives accordingly
 Send eCampaign reminders (if applicable)
 Continue sharing United Way impact stories

BONUS BEST PRACTICE
○ Host business unit events and kickoffs to raise awareness and increase participation
○ Host a Day of Action or Care Project

STEP 3

CAMPAIGN WRAP-UP

CORE BEST PRACTICE
 Conduct a closeout meeting with your United Way representative and make sure to discuss year-round engagement opportunities
 Share final campaign fundraising total and don’t forget to thank and show appreciation to employees!

CAMPAIGN LEADER CHECKLIST

EVERY CAMPAIGN IS DIFFERENT!

This chart is a sample timeline and checklist to help plan and execute your United Way campaign. Campaigns can be as short as 2 weeks or as long as 12 weeks. Contact your United Way representative for more information on how to plan a best-practice campaign.

CORE BEST PRACTICE
 Meet with your United Way representative and any previous campaign team members to review successes and challenges from the previous year
 Determine campaign dates, length, locations and fundraising goals, then confirm with your United Way representative
 Get your co-workers involved! Assemble a campaign committee and assign roles and responsibilities

BONUS BEST PRACTICE
○ Develop Tocqueville Society and Affinity Group engagement strategy by identifying donors and planning events

STEP 1

CORE BEST PRACTICE
 Develop a campaign theme, calendar of events and incentives, and recruit additional campaign committee members as necessary
 Brief executive leadership on key objectives of your campaign and secure CEO buy-in
 Talk to United Way representative about configuring eCampaign platform

BONUS BEST PRACTICE
○ Develop communications plan and order campaign marketing materials through your United Way representative

STEP 2

CORE BEST PRACTICE
 Meet with your United Way representative and any previous campaign team members to review successes and challenges from the previous year
 Determine campaign dates, length, locations and fundraising goals, then confirm with your United Way representative
 Get your co-workers involved! Assemble a campaign committee and assign roles and responsibilities

BONUS BEST PRACTICE
○ Develop Tocqueville Society and Affinity Group Ambassadors

STEP 3

CORE BEST PRACTICE
 Host a fun and engaging kickoff event!
 Invite your CEO and United Way representative to talk about United Way’s impact
 Send an eCampaign welcome email (if applicable)

BONUS BEST PRACTICE
○ Host Tocqueville Society and Affinity Group events and ask ambassadors to follow up with donors

STEP 4

CORE BEST PRACTICE
 Develop a campaign theme, calendar of events and incentives, and recruit additional campaign committee members as necessary
 Brief executive leadership on key objectives of your campaign and secure CEO buy-in
 Talk to United Way representative about configuring eCampaign platform

BONUS BEST PRACTICE
○ Develop communications plan and order campaign marketing materials through your United Way representative

STEP 3

CORE BEST PRACTICE
 Meet with your United Way representative and any previous campaign team members to review successes and challenges from the previous year
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 Get your co-workers involved! Assemble a campaign committee and assign roles and responsibilities

BONUS BEST PRACTICE
○ Develop Tocqueville Society and Affinity Group Ambassadors

STEP 4
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! Host a Day of Action, assemble Care Project kits as a teambuilding exercise, 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