2020/2021 Campaign Leaders Guide
Running a United Way Campaign, In-Person or Virtually
Hello, and thank you for serving as your organization’s United Way Campaign Leader. What a year this has been! A global pandemic. A national reckoning with race relations and equity. Civil unrest. These events have challenged us in ways we could not imagine and amplified the inequities that have impacted the Chicago region long before 2020. But through these events, we have also seen people rise up to extend a hand to a neighbor in need or give when they were able. Whether you’ve supported United Way for years or just learned about their work through our recent leadership of the COVID-19 response efforts, I’m glad you’re with us. I have been committed to United Way my entire career, and it was easy to say ‘yes’ to this role because I’ve seen how United Way makes our communities better. I’m convinced that stepping up to organize a United Way Campaign this year is one of the best ways you too can use your time and talents to help strengthen our communities.

With restrictions on in-person activities, this year’s campaign may look different in your organization. We’ve designed this Campaign Leaders Guide to meet you and your company where you are. We’ve included new tools and ideas for virtual engagement and volunteerism, and you will still find the best-practice structure of a workplace campaign. In fact, by following these best practices our team at Peoples Gas nearly doubled our collective contribution to United Way between 2015 and 2018. We will be using many of these best and new practices to continue engaging Peoples Gas’ employees because the one thing that is certain is that people want to connect.

Please spend some time with the content in this Guide and then connect with your United Way representative. Campaigns are always wonderful times to bring your organization together around something greater, and this year, it’s an especially important way to provide employees opportunities to connect with one another. Whether fun, informal, serious, data-driven, or some combination of everything, the United Way team is ready to help you run a campaign that fits your team’s needs and culture.

Our neighbors are counting on the United Way family for ongoing support, solutions, and a hand up out of this crisis. We are so pleased to have your leadership on this journey. Thank you.
5 Steps to Running a Successful Campaign

We have shifted our Campaign Leaders Guide to acknowledge that many campaigns will include more virtual components this year, if not operate 100% virtually. We stand prepared with new tools and resources to execute, but the bones of running a successful campaign remain the same – Plan, Inspire, Ask, and Thank!

**STEP 1  Connect with us**
We want to better understand your goals and how you would like to approach a virtual campaign. We also want to tell you more about our strategy for ongoing response to COVID-19 and building equitable communities!
- Call your United Way representative to get started. If you don’t know who your contact is, call us at 312.906.2204 or email donorhelp@LIVEUNITEDchicago.org.

**STEP 2  Make a Plan**
The keys to campaign success are preparation and teamwork, especially if you’re operating virtually. Having the right group of campaign volunteers will increase the success of your campaign and make your role much easier.
- Set fundraising and participation goals, objectives and a timeline, and identify and recruit your team.
- Configure an online giving platform for a more streamlined donor experience.
- Learn about various strategies to make your campaign fun and engaging. Call us – we have added a whole new menu of virtual options!

**STEP 3  Inspire Co-Workers**
Tell people how their dollars are making a difference. Share stories about our neighbors who have been impacted by the COVID-19 and social justice crises.
- Promote a culture of giving back. A successful campaign requires frequent communications and reminders.
- Engage co-workers in the campaign through virtual engagement and volunteerism. Don’t talk at them, get them talking with each other, learning, and sharing.
- Share your own personal story about why you support United Way.

**STEP 4  Make the 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! We have a guide for how to do that virtually.
- Create fun activities to drum up support and provide incentives for your colleagues to participate, such as earning an extra vacation day if you give in the first 24 hours or purchasing raffle tickets to win a free lunch delivery or a subscription to Spotify. Get competitive while giving back!
- Have your company CEO write a letter or make a speech. CEO commitment and leadership helps drive participation.
- Let’s talk format. If peer-to-peer in-person asks aren’t an option this year, let us walk you through email / virtual best practices.

**STEP 5  Convey Gratitude**
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.
- Send individualized thank-you notes to each donor. Don’t forget to say “Thank You!”
Now that you understand the Plan, Inspire, Ask, Thank structure, let’s get tactical!

Every Campaign is Different!

This checklist is a sample timeline to help plan and execute your United Way campaign. Campaigns can vary in length and be as short as 1 week. Your United Way representative can help you right-size a timeline for your organization.

**Core Best Practice**
- Zoom 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/or virtual options, and fundraising & participation goals
- Get your co-workers involved! Assemble a campaign committee and assign roles and responsibilities

**Bonus Best Practice**
- Choose Tocqueville Society and Business Resource Group ambassadors

**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 your United Way representative about configuring online giving platform

**Bonus Best Practice**
- Develop Tocqueville Society and Business Resource Group engagement strategy by identifying donors and planning virtual events

**Core Best Practice**
- Develop communications plan.
- Order campaign materials (if in-person)
- Visit the Campaign Toolkit online at LIVEUNITEDchicago.org/campaign-toolkit to check out campaign tools and templates, including new virtual options

**Bonus Best Practice**
- Develop plan to host virtual volunteering and engagement options. Learn more online at LIVEUNITEDchicago.org/volunteer

**Step 1**

**Core Best Practice**
- Host a fun and engaging kickoff event!
- Invite your CEO and United Way representative to talk about United Way’s impact
- Use your company’s preferred platform (Zoom, WebEx, Skype, etc.) or host on United Way’s Zoom account (up to 300 participants)
- Length can vary: (Recommended @ 30 minutes)

**Bonus Best Practice**
- Record kickoff for employees who have to miss it and share the video in smaller gatherings, on your internal employee site, and campaign welcome email
- Host Tocqueville Society and Business Resource Group virtual kickoffs and ask ambassadors to follow up with donors

**Step 2**

**Core Best Practice**
- Conduct a closeout Zoom 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!

**Step 3**

**Core Best Practice**
- Track progress and adjust strategies and incentives accordingly
- Send online giving reminders (if applicable)
- Continue sharing United Way impact stories and engagement opportunities

**Bonus Best Practice**
- Host virtual events for giving groups (e.g. Leadership or Tocqueville Society Givers), business resource groups, or business units to create competition and increase participation
- Host a virtual Day of Action or Care Project

**Step 4**

**Core Best Practice**
- Prepare for your campaign
- Train any campaign volunteers and ambassadors—we can assist
- Build excitement! Share United Way impact stories and videos
- Share calendar of events and incentives with all staff

**Core Best Practice**
- Host a virtual Day of Action or Care Project
Data-driven Presentations

Some people are driven by numbers! Help make the case for support with presentations and Q&A for employees who want to learn and understand how United Way identifies the areas of greatest impact.

CHICAGO NEIGHBORHOODS: STORY OF DATA Let United Way guide a conversation about our city’s neighborhoods through a few different lenses. Explore how health, income, and racial disparities affect very specific geographies in Chicago and learn why United Way takes a place-based approach and prioritizes 10 Neighborhood Networks.

WALK IN MY SHOES This brief, 10-minute online simulation gives employees a chance to “spend a day” in someone’s shoes who lives in a community that is not their own. No homework is necessary, but participants who bring their curiosity and a willingness to learn will absorb a mountain of information about the tough choices our neighbors make every day.

MEET ALICE ALICE is an acronym for Asset Limited, Income Constrained, Employed. Take a deep dive to learn more about the growing number of families in Chicago that live above the poverty line, but do not earn enough to afford basic necessities of housing, child care, food, transportation, and health care. United Way’s research on ALICE families shows that there are pockets of ALICE families everywhere—in the suburbs and throughout Illinois.
Storytelling Segments

Other people learn best when information is shared through stories and examples. Hearing from community members who are involved in United Way really brings our mission to life. We suggest watching these videos together, followed by discussion facilitated by a United Way representative.

**WHY I GIVE** Show co-workers how important their role in the campaign is by telling stories about why people donate. The best and most relatable stories will come from within your own organization. So please share your story, highlight a Leadership Donor, or ask someone who has either made their first gift or been giving for 5+ years in a row to talk about “Why I Give.” United Way also has recorded donor testimonials that provide for 2–3 minute-long stories.

**NEIGHBORHOOD NETWORK LEADER** In each of the 10 priority neighborhoods, a lead nonprofit agency serves as what United Way calls the “Community Quarterback.” These Neighborhood Network Leaders share their unique perspectives on what life is like in their community, plus their on-the-ground strategies to improve the health, housing, food, childcare, and educational opportunities in their neighborhoods. We have recorded conversations with Community Quarterbacks that you can share that range from 3–30 minutes in length.

Interactive Sessions

Employees want to connect with each other as much as they want to connect with their communities. These sessions are designed to bring people together, have fun, and learn a thing or two about how campaign donations make a real difference.

**COMMUNITY CONVERSATIONS** Members of our United Way team facilitate a discussion with a small group of employees around community and solutions. Discussion prompts include regional trends around health and human service issues, what employees see in their own communities, possible solutions, and how your employees and/or your organization may contribute to those solutions. There is so much brilliance and innovation in our region and we want to tap into what employees think and engage them in solutions.

**GET TO KNOW THE CHICAGO REGION ONLINE**

- **QUIZZES** Virtual quizzes can be completed individually or during a group Zoom where live polling allows participants to see the popularity of responses as participants register their answers.

- **VIRTUAL AUCTIONS** Invite your leadership team or individual business units to donate items or baskets for auction. If you’ve done live raffles and auctions in the past, there are great online options with 32Auctions.com, BiddingOwl, etc. that will attract employees who love prizes + stir some friendly bidding war competition.

**LUNCH ‘N LEARNS / HAPPY HOURS** We organize lunch and learn (or happy hour!) discussions on Zoom with leaders of your organization and members of the United Way Community Impact team. Speakers come with a very brief presentation around a topic we choose with you. It also includes discussion prompts so most of the hour together can be spent in conversation. The topics of these sessions can be broad in scope, or more focused. Ideal for individual departmental or business resource group engagement.
Group Opportunities (10 – 250)

- **PACK AND LEARN** Gather your team virtually and create “shoe box” kits of supplies requested by United Way agency partners. While your teams are packing their boxes, they can learn about our Neighborhood Network Initiative and hear from United Way staff and/or community leaders working to support recovery efforts. All “shoe boxes” will go directly to the agency that requested the supplies.
  
  *Types of Kits: Hygiene Kits, Baby Kits, Snack Packs, Literacy Kits*

- **PROTECTIVE FACE MASK PROJECT** Non-profits across the Chicago region are on the front lines providing support to families and individuals in need. Many agencies are still in need of protective equipment for employees and clients who need services. Help us create masks to send out to our agency partners.
  
  *Materials Needed: bandanas or t-shirts and scissors*

- **DONATION DRIVE** Agencies need a variety of supplies from puzzles, board games and toys to PPE and baby items. Organize your co-workers to collect and send supplies to agencies. This activity can accommodate a virtual presentation or panel about our Neighborhood recovery program.

Individual/Small Group Gatherings

- **CAREER PANELS** Employees can volunteer to be a part of a virtual panel for high school students interested in learning about diverse jobs and better understanding the education and experience path for various industries.

- **RESUME PREP WORKSHOPS/MOCK INTERVIEWS** Volunteers will serve as a 1:1 career coach via a United Way career workshop event, designed to help agency clients/students update their resumes and/or prep for interviews.

- **SKILLS-BASED SUPPORT** Our Neighborhood Networks represent a coalition of community agencies that provide the services and support needed to transform a neighborhood. We have surveyed these networks and have identified agencies that are seeking professional consulting support in several fields. Detailed opportunities will be set up to ensure the volunteers are best equipped to meet the needs of the agency partner.