2023/2024
Campaign Leaders Guide
Running a United Way Campaign (In-Person, Hybrid, or Virtually)
Hello! Thank you for representing your organization as a United Way Campaign Leader. We are thrilled to have you join us as, together, we energize our colleagues to make a difference and help build a stronger, more equitable Chicago region.

I have been supporting United Way of Metro Chicago through Northern Trust’s employee giving campaign for more than 40 years – ever since I joined the team in 1982. I also serve on the United Way Board of Directors and Tocqueville Committee, where I help drive high-impact work with the support of fellow philanthropic leaders.

Northern Trust is rooted in a culture of giving, going all the way back to the founding of United Way of Metro Chicago more than 90 years ago. During the Great Depression, representatives from Northern Trust were on the committee that started the Emergency Welfare Fund to support the thousands of people who were recently unemployed. The fund would later evolve into United Way of Metro Chicago.

I am honored to carry on this partnership and legacy by serving as your 2023/2024 Campaign Chair, a role that has been held by so many impressive Chicago leaders, including my own Northern Trust colleagues, David Fox, Bill Osborn, and Rick Waddell.

Over the course of my career, I have had the opportunity to see our community from many different perspectives. And there has been no time more than now where the good work and leadership of United Way has been more needed. I love what United Way represents as a convener, working side-by-side with community-based organizations to meet our neighbors’ basic needs and transform neighborhoods from the inside out.

I am grateful for the vast network of United Way supporters and for your leadership and generosity as we work to ensure every child has better access to quality education, our communities are safer, our neighbors are healthier, incomes increase, and our region prospers.

As we keep equity at the forefront of our work together, please review our Campaign Leaders Guide for ideas to engage team members and best practices for structuring a workplace campaign. Your United Way representative is available to help you develop your organization’s campaign strategy to achieve your goal. No matter the size, scope, or tone of your campaign, the United Way team is here to support you.

Thank you so much for your commitment as a Campaign Leader. I look forward to collaborating with you and working together to build thriving communities throughout the Chicago region.
5 Steps to Running a Successful Campaign

Our Campaign Leaders Guide meets you and your teams where you are, whether that be 100% in-person, 100% virtual, or a hybrid of the two. We stand prepared with tools and resources to execute a successful campaign, with the underlying structure of **Plan, Inspire, Ask, and Thank!**

**STEP 1  Connect with Us**

We want to better understand your goals and how you would like to approach your campaign. We also want to tell you more about our strategy for building stronger, more 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. 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 many options for in-person, virtual, or hybrid activities!

**STEP 3  Inspire Co-Workers**

Tell people how their dollars are making a difference. Share stories about our neighbors who are struggling to make ends meet or those who have been impacted by racial inequities.
- 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 can help you do that virtually or in person.
- 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, 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 help drive participation.
- Let’s talk format. If peer-to-peer, in-person asks aren’t an option, 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 one week. Your United Way representative can help you right-size a timeline for your organization.

**STEP 1**

**Core Best Practice**
- Schedule an in-person or Zoom meeting 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, plus fundraising and participation goals.
- Get your co-workers involved! Assemble a campaign committee and assign roles and responsibilities.

**Bonus Best Practice**
- Choose Tocqueville Society ambassadors, Business Resource Group ambassadors, and union leaders.

**STEP 2**

**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 an online giving platform.

**Bonus Best Practice**
- Develop Tocqueville Society, Business Resource Group, and union engagement strategies by identifying donors and planning events.

**STEP 3**

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

**Bonus Best Practice**
- Develop a plan to host in-person or virtual volunteering or engagement activities. Learn more online at [LIVEUNITEDchicago.org/volunteer](http://LIVEUNITEDchicago.org/volunteer).

**STEP 4**

**Core Best Practice**
- Host a fun and engaging kickoff event!
- Invited your CEO and United Way representative to talk about United Way’s impact.
- If virtual, 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 virtual or hybrid kickoffs 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, Business Resource Group, and union kickoffs and ask ambassadors to follow up with donors.

**KICK OFF YOUR CAMPAIGN**

**DURING CAMPAIGN**

**CAMPAIGN WRAP-UP**

**Core Best Practice**
- Conduct a close-out in-person staff rally or Zoom with your United Way representative and make sure to discuss year-round engagement opportunities.
- Share the final campaign fundraising total. Don’t forget to thank and show appreciation to employees!