Campaign Toolkit Overview

Thank you for participating in The Chicago Bar Foundation’s 12th Annual Investing in Justice Campaign. Your leadership is essential to the success of this year’s Campaign and to ensuring that pro bono and legal aid organizations in Chicago can continue their vital work.

We know your time is valuable, and we want to make your job as easy as possible. In this toolkit you will find all the items you need to run a successful Campaign. While these materials offer strategies and examples that have been successful, we recognize that the culture at every firm, company or organization is unique and that some approaches may be more or less suited for you.

Included in the Campaign toolkit, you will find the following documents:

- **Campaign Execution Checklist**
- **Setting Expectations for Success**
- **Sample Communications Timeline**
- **Ideas that Work: Proven Campaign Techniques**
- **Incorporating Social Media Into Your Campaign**
- **Day 1 Letter**
- **Sample Emails**
- **Facts, Statistics & Stories**
- **Donation Tracking Worksheet**

On the [toolkit and materials page](#) on the CBF website, there are also other materials available that you may find useful, including: poster designs, a Campaign slideshow, the Campaign brochure, and talking points for Campaign presentations.

The CBF staff is ready to assist you whenever and wherever needed. Our contact information is provided below. Please call us anytime. Thank you for your leadership and partnership in this important community-wide effort. We look forward to working with you!

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Campaign Execution Checklist

The following eight steps have proven critical to running a successful Campaign:

- **Identify a Campaign Team**
  
  Your Campaign team will handle the internal administration and implementation of your Investing in Justice Campaign. Putting together a team of partners and associates (or the equivalent positions in your corporate legal department or organization), including members of your Pro Bono Committee, has proven to be more successful than relying on a single volunteer. Vice Chairs, Campaign Captain(s), and others serving on your Campaign team will need to determine how to conduct your internal Campaign. You can find effective execution strategies in *Ideas that Work: Proven Campaign Techniques*.

- **Determine Your Campaign Communications Program**
  
  Determine the internal Campaign communications strategy that will work best for you and the culture at your law firm, corporation or organization. Some participants choose a five-day Campaign strategy with daily communications to their attorneys. Some choose to spread out the Campaign communications over a longer period, e.g., two weeks. In this toolkit you will find sample emails to send to your attorneys that highlight the importance and impact of the Campaign. Some participants use or adapt these samples; others prefer to create their own communications. We've also provided you with facts, statistics and stories you can use to create your own personal messages. Whatever you choose, the important thing is to communicate the need, motivate participation, and share the opportunity to contribute and make an impact none of us could on our own.

- **Create Your Campaign’s Personal Outreach Strategy**
  
  In addition to your communications plan, personal outreach will be key to your Campaign’s success. One strategy involves delivering Campaign materials and communications during the first week, followed by one-to-one contact in week two. Having a motivated Campaign team in place to make personal visits and calls on a peer-to-peer basis will produce the best results for your Campaign.

- **Choose a Start and End Date for Your Campaign**
  
  Once you have determined an effective communications plan, decide which days in March you will run your Campaign and insert the dates for your planned communications on the enclosed *Sample Communications Timeline*. Please begin your Investing in Justice Campaign on or after March 5th and complete it by the end of March if possible. Be sure to schedule around any firm-wide events (e.g., a partner retreat) which might make it difficult to engage all of your attorneys in the Campaign. Also, please consider the timing of area schools’ spring breaks in late March and early April when setting your Campaign schedule.
Campaign Execution Checklist

☐ Provide Adequate Preparation Time for Assembling Materials

All Investing in Justice Campaign materials and information for your attorneys can be distributed through your internal mail and email. You will receive all the materials you need from the CBF.

Two clerical tasks need to be completed before you launch your Campaign:

• **Assemble Mailing.** On the first day of your Campaign, each of your attorneys should receive three items through internal mail that will need to be collated and prepared for distribution. The mailing includes:
  - Memo or letter from your firm's Vice Chair and/or Campaign Committee
  - Campaign brochure with attached contribution card
  - Return envelope addressed to your Campaign Vice Chair

• **Address Return Envelopes.** All contributions should be returned to your Campaign Vice Chair to ensure an accurate accounting of donations. Please personalize the return envelopes with the name of your Vice Chair, and instruct attorneys on where to return their donations and contribution cards. (Or, in the case of online contributions, to forward the autoreply message they receive.) Once all contributions have been collected and tracked internally, please contact the CBF to coordinate delivery.

☐ Inform Your Facilities Personnel about the Campaign

Let your mailroom supervisor know to expect the Campaign materials and that the project includes delivering the internal mailing to every attorney's office in-box on day one of your Campaign.

☐ Obtain Assistance from Your Administrative Staff

A person should be assigned to keep track of all contributions in the Excel spreadsheet file included with these toolkit materials. This information should be reported to the Campaign Vice Chair and Campaign team leaders daily or in regular intervals so it can be included in follow-up communications to your attorneys.

**Online Contributions.** Contributions can be made securely online at chicagobarfoundation.org. Attorneys making contributions online should still complete the contribution card and return it to the Vice Chair (checking the appropriate box and noting the date of the donation), or forward to the Vice Chair the email reply they receive after making their online donation.

☐ Coordinate with Your Marketing Department

Please enlist your marketing department to help promote the Campaign internally to increase participation among your attorneys. (See the enclosed Ideas that Work: Proven Campaign Techniques.)
Setting Expectations for Success

Ask amounts
While we recognize and encourage everyone to contribute at a level that is personally meaningful, giving guidance on what is expected is a proven strategy for increasing contributions. To that end, two different strategies have proven effective for presenting a suggested donation amount to your colleagues.

Contribution Ranges
While some firms and companies have set higher ranges for more established lawyers there, the contribution ranges below have been established based on suggestions from past Campaign participants. Recognizing that many will give more and some less than the ranges presented, these suggested contribution levels that most participating firms and companies have found work well for them and that you can share as appropriate:

- Associates (or equivalent) $100 - $250
- Of Counsel/Counsel (or equivalent) $250 - $500
- Partners (or equivalent) $500 - $1,000+

As a Percentage of Base Salary—1/10th of 1%
An alternative to contribution ranges is using a small fraction of the participant's income as a guide. Some firms and companies have requested that everyone consider making a gift equal to at least 1/10th of 1% of their annual income. For example, an attorney with income of $100,000 would contribute $100, while someone making $250,000 would give $250. This has proven effective because it means everyone is being asked to support the Campaign at the same level based on their personal circumstances.

Year-over-Year Goals
For repeat participants, one way to build on your success is to establish a manageable increase in your year-over-year goals.

Overall Participation
- If you have reached 100% participation before or it is within reach, make that a focus in your internal messaging.
- If you haven't already hit 100% and that goal seems unrealistic based on last year's results, set a more attainable short-term goal, such as a 10% increase in participation over last year.
- If you didn't quite reach the initial Honor Roll threshold of 50% at your firm or company last year, make that a focus in your internal messaging. If you already reached 50% but not the next level of the Honor Roll (70% and above), that can be your goal for this year.

Individual Contributions
- Ask everyone to consider a 5-10% increase in their personal contribution from last year. Doing so will lead to a significant increase in the overall Campaign total.
Setting Expectations for Success

Your Campaign Goal

Participation Percentage
Our ultimate goal is 100% participation across all participating firms and companies, and many participants of varying sizes already have been able to achieve that lofty goal. However, we understand that for a variety of reasons, 100% participation is not always an immediately attainable goal for all firms and companies. If you would prefer to establish a more attainable goal for your attorneys, we recommend you set a goal of a 10% increase in participation over last year and/or reaching the next level of the Campaign Honor Roll.

Total Dollar Amounts
Based on results from the past ten years, these ranges provide a target for your planning purposes that have proven to be achievable for your peers in the same range of size. If every participating firm or company reaches a fundraising goal within the range corresponding to their size, together we will exceed our overall Campaign goal.

<table>
<thead>
<tr>
<th># Attorneys</th>
<th>Target Range</th>
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<tbody>
<tr>
<td>300+</td>
<td>$100,000 – $350,000</td>
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<tr>
<td>200-299</td>
<td>$50,000 – $100,000</td>
</tr>
<tr>
<td>100-199</td>
<td>$30,000 – $50,000</td>
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<tr>
<td>50-99</td>
<td>$15,000 – $30,000</td>
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<tr>
<td>25-49</td>
<td>$10,000 – $20,000</td>
</tr>
<tr>
<td>10-24</td>
<td>$5,000 – $15,000</td>
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<tr>
<td>&lt;10</td>
<td>$1,000 – $10,000</td>
</tr>
</tbody>
</table>

2018 Total Campaign Goal: More than 5,200 individual donors and more than $1.52 million in individual contributions
Sample Communications Timeline

NOTE: After each of your attorneys receives the memo or letter from your firm’s Vice Chair and/or committee, a hard copy of the Campaign brochure (that includes a perforated contribution card), and a return envelope through your internal mail on the day you start your Campaign, we encourage you to use the email communication guidelines below as a guide for your efforts.

Choose the intervening email communications or adapt a plan of your own that best fits the culture at your law firm, corporation or organization. Sample emails as well as a compilation of key facts, statistics and stories for your personal messages are also included with this toolkit. Once you have decided on the start date of your Campaign, you can insert the corresponding dates that the various communications will be distributed. Running your Campaign over a two week time period has proven to be effective for most participants. Please conduct your internal Investing in Justice Campaign beginning on or after March 5th and complete it by the end of March if possible.

<table>
<thead>
<tr>
<th>Communication Type</th>
<th>Date of Communication</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Communication</td>
<td>(distribution date)</td>
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<tr>
<td>2nd Communication</td>
<td>(distribution date)</td>
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<tr>
<td>Follow-up communication</td>
<td>(distribution date)</td>
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<tr>
<td>Alternate follow-up communication</td>
<td>(distribution date)</td>
</tr>
<tr>
<td>Concluding communication</td>
<td>(distribution date)</td>
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</tbody>
</table>

After every attorney receives the Campaign brochure w/ contribution card, return envelope, and letter from the Vice Chair via internal mail, send the first email communication to supplement your day one mailing.

Send a second email to all attorneys. Choose from enclosed samples or customize your own. Many participants will send more than one email from the samples over the course of a few days.

Send partner-to-partner and associate-to-associate emails. See enclosed samples.

Send email to all attorneys who have not yet given. See enclosed sample.

Send reminder and/or thank you email to all attorneys. See enclosed sample.
Ideas That Work: Proven Campaign Techniques

The following suggestions highlight several ways to successfully promote the CBF Investing in Justice Campaign internally. These are proven strategies and techniques that have worked effectively for other participants. Please consider the following best practices:

Creating a Campaign Committee

- Have at least two captains, one partner and one associate (or the equivalent positions in your corporate legal department or organization) on your Campaign Team. Peer to peer outreach consistently has proven to be most effective.

- For larger firms or organizations, appoint one or more partners and associates (or equivalent) on each floor or in each department, practice group or associate class to personally encourage participation. **Individual outreach is the most effective strategy for inspiring contributions.**

- If you have a pro bono partner or director at your firm or company, enlist their help on the team.

- Recruit colleagues from the marketing department, facilities management, and human resources.

- Have Campaign team members personally reach out to their colleagues, asking for support.
  - Door-to-door visits and personal phone calls
  - Each team member takes responsibility for a set number of personal contacts
  - Ensure that each individual attorney is personally contacted and asked to support the Campaign

Obtaining Leadership Support

- Securing support from key people in your law firm, corporation or organization in advance of launching your Campaign is essential. Publicize their support as part of your internal Campaign kickoff.

- Ask leaders for supportive quotes you can use as you promote your Campaign (e.g., their personal pro bono experiences, their work with the CBF and/or CBF-supported organizations, and/or why they are personally inspired to contribute).

- Enlist one or more partners to individually or collectively make a challenge gift to inspire others to give generously or to contribute for the first time (e.g., I/we will contribute $100 for every attorney here who gives at the minimum ask level, up to $X,XXX.00).

- Identify associates who have credibility and influence among their peers, and ask them to play a lead role on the team.
Ideas That Work: Proven Campaign Techniques

Publicizing Your Campaign

- Hold a firm-wide kickoff meeting or event where the Managing Partner, Vice Chair and/or other members of the Campaign Team make personal appeals. A Campaign slideshow presentation and a collection of videos from Campaign-supported legal aid organizations are available as options to show at your meeting or event. You can find these materials at chicagobarfoundation.org/campaign/materials.
- Make direct appeals at firm events, partner meetings, associate functions, etc.
- Ask attorneys to share their personal pro bono experiences and/or to speak about their involvement with a CBF-supported organization and why they feel the Campaign is important.
  - These pro bono experiences can also be shared as testimonials in flyers, emails or on posters.
- Invite CBF representatives to speak or assist at your kickoff and/or lunchtime or practice group meetings.
- Tie in existing events or holidays during the month of March, such as March Madness, St. Patrick's Day, or Pi Day.
- Create posters for the hallways and common areas like the lunch or break rooms. (Poster-ready artwork is available.)
- Create contribution recognition pieces for attorneys who donate with the message “I Invested in Justice Today” (e.g., buttons, door stickers, ribbons, etc.). Several firms put stickers on the office doors of each person that donates (customizable artwork is available). In addition to publicizing the Campaign, this can help with knowing who has already given when doing door-to-door follow up.
- Theme a goal around a firm anniversary.
- Establish friendly internal competitions. One firm has been successful displaying thermometers on each floor that track that floor's participation percentage and total amount contributed in a competition between floors.
- Highlight your participation and leadership in this community-wide effort on your website, social media platforms, etc.
- Host a CLE for attorneys in your firm, focusing on issues related to access to justice and the work that the Campaign supports. Encourage attendees to participate in the Campaign by suggesting that attendees make a donation. CBF staff can help you with ideas and speakers for a CLE.
Ideas That Work: Proven Campaign Techniques

Motivating Participation

- **Internal Competitions.** Depending on the size and structure of your firm or organization, conduct floor by floor, practice group or associates vs. partners challenges:
  - By percentage of attorneys participating or by money raised per floor, practice group or associate class (or equivalent positions in your corporate legal department or organization).
  - Create an Investing in Justice Campaign Challenge using financial updates during the Campaign to drive competitive spirit. Set an ambitious Campaign goal at the onset and challenge your attorneys to reach or exceed your target.
  - Some firms have organized pop-up, or flash, competitions throughout the course of the Campaign, announcing by email a competition between two groups over a short time period (like a morning or day) with a small prize, often food, for the winning group.

- **Raffles:**
  - Enter everyone who donates at the minimum suggested levels. (NOTE: You should make sure to note that contributions are not necessary to be entered into the raffle for IRS purposes. This does open the door to “free riders” but only very rarely becomes an issue as a practical matter).
  - You can also incentivize early giving by awarding more raffle tickets the earlier someone donates (e.g., five tickets for donors on Monday, four on Tuesday, etc.).
  - Announce raffle winners via email to all attorneys or at a reception where people can contribute right up until the time of the drawing. (Having a laptop on hand for last minute online contributions can be helpful.)

- **Incentives:**
  - Offer the winning team in an internal competition a prize. Prizes can range from morning donuts to chair massages to access to your firm or company’s tickets or skybox, and anything in between. Some firms have offered after-hours socials or lunches to participating or winning groups.
  - You may be able to obtain prizes from firm vendors (e.g., airline tickets, electronic devices, gift certificates).
  - One firm organizes a pop-up competition around Pi Day (March 14 this year). The winning group is treated to a selection of pies as an afternoon treat.
  - Several firms have designed carts to be pushed door-to-door while rewarding Campaign participation and soliciting promises to donate. Some have been bar carts, while others have offered donuts in the morning or sweets or ice cream in the afternoon. At one firm, a well-known partner served as the guest bartender!
  - Donations to the Campaign or winners of a Campaign challenge can be rewarded with participation in a fun event within the office, like a mini golf or bean bag tournament, or an Olympics-themed games event. This can be a good way to simultaneously promote the Campaign, reward participation, and bring attorneys and others together in a fun, collegial atmosphere.
Ideas That Work: Proven Campaign Techniques

- To encourage early giving, you can allow attorneys that donate to wear jeans for the rest of the week, starting on the day they donate. As added motivation, you can allow all staff to wear jeans once attorney donations reach a certain tipping point.

  - **Payroll Deductions.** Several firms make donating even simpler by offering donors the option to have their donation deducted directly from their paycheck.

Thanking Everyone Involved

- Recognize the Campaign team’s contribution to your overall success (e.g., hold a final results meeting/celebration, give out small acknowledgment gifts, send firm-wide email thanking everyone by name).

- Invite Campaign team members to future CBF events as guests of your firm, corporation or organization.
Incorporating Social Media into Your Campaign

Social media can be a powerful tool for educating and engaging your personal networks. The following suggestions are ways to promote the Investing in Justice Campaign on social media to increase awareness and impact.

**Social Media 101**

- Tag the CBF in your posts by typing [@chicagobarfoundation](https://www.facebook.com/chicagobarfoundation) on Facebook or [@ChicagoBarFound](https://twitter.com/ChicagoBarFound) on Twitter.
- Link to the Campaign's webpage in your posts: [chicagobarfoundation.org/campaign](http://chicagobarfoundation.org/campaign).
- Include the Campaign’s hashtag #IIJ2018 in your posts, and use it to track Campaign social media activity.
- Take photos at your firm or company’s kickoff parties, events, competitions, or other Campaign-related activities and share on social media. Be sure to tag the CBF so that we can share your posts. Alternately, you can email photos or information to CBF staff to post. We would love to publicize the hard work you put into your internal Campaign!

**For Individuals Posting about the Campaign**

We encourage Campaign Vice Chairs and others involved in running the Campaign at your firm or company both to: (1) post individually on social media, and (2) to encourage individual donors to do so as well.

- The CBF will be posting about the Investing in Justice Campaign throughout March on [Facebook](https://www.facebook.com), [Twitter](https://twitter.com), and [LinkedIn](https://www.linkedin.com). Follow the CBF and share Campaign-related posts.
- Share your favorite “Campaign in Action” feature.
- Highlight your involvement with one of the [pro bono and legal aid organizations](https://www.chicagobarfoundation.org/campaign) supported by the Campaign.
  - Example: I support @ChicagoBarFound's Investing in Justice Campaign bc it supports vital legal aid orgs like @CARPLS #IIJ2018 chicagobarfoundation.org/campaign
- Share a message from [Facts, Statistics & Stories](https://www.chicagobarfoundation.org/campaign).
- We’ve created an [image template](https://www.chicagobarfoundation.org/campaign) that can be shared on social media and would be happy to customize it for you. Please contact Meredith Mazzuca at mmazzuca@chicagobar.org to request your customized image.

**Sample posts:**

- Facebook (or LinkedIn): I support the Investing in Justice Campaign because 600,000 low-income Chicagoans will face a legal problem this year and won’t be able to afford a lawyer [or insert personal reason]. #IIJ2018 chicagobarfoundation.org/campaign
- Twitter: @ChicagoBarFound Investing in Justice Campaign is where Chicago's legal community comes together to support 30+ outstanding legal aid organizations #IIJ2018 chicagobarfoundation.org/campaign
- Twitter: @ChicagoBarFound Investing in Justice Campaign—because everyone deserves access to justice not just people who can afford it chicagobarfoundation.org/campaign
For Law Firms/Corporations Posting about the Campaign

- The CBF will be posting about the Investing in Justice Campaign throughout March on Facebook, Twitter and LinkedIn. Follow the CBF and share Campaign-related posts.

- Highlight your involvement with one of the pro bono and legal aid organizations supported by the Campaign.
  - Example: We participate in @ChicagoBarFound's Investing in Justice Campaign because it supports vital legal aid programs like @CVLS_legalaid #IJ 2018

Sample Posts:

- Twitter: [Firm/Company] is proud to join our colleagues throughout Chicago's legal community in @ChicagoBarFound's Investing in Justice Campaign to support 30+ great pro bono and legal aid organizations #IJ 2018
  chicagobarfoundation.org/campaign

- Facebook: As a supporter of @The Chicago Bar Foundation's Investing in Justice Campaign, we are joining colleagues throughout Chicago's legal community to make access to justice a reality for tens of thousands of Chicagoans.
  chicagobarfoundation.org/campaign