

Leadership Giving

Leading the Way:

Encouraging Personal Leadership Giving In Your Workplace Campaign

A sure way to experience an increase in your organization's giving, is to run a Leadership Giving Campaign. **The key to running a successful leadership campaign is to choose a strategy that will work best within your organization's corporate culture.** Successful Leadership Campaigns are designed to best meet the needs of your colleagues so they can make an educated and informed decision regarding their gift to United Way.

1. Obtain the support of your CEO

- CEO / Management endorsement is critical for a successful Leadership Giving campaign
- Your CEO should be given the opportunity to make a leadership gift
- Your CEO may be the most effective person to make a leadership ask

2. Recruit a Leadership Giving Coordinator

- Recruit a well respected member of senior staff to act as Leadership Giving Coordinator and conduct a leadership giving campaign (The CEO may be the best candidate).
- The Leadership Giving Coordinator should work closely with the Campaign Coordinator to ensure optimum results.
- The Leadership Giving Coordinator must be a leadership giver.

3. Recruit a Team

- If your organization has more than 10 leadership contributors or prospects, one person may not be sufficient to adequately visit with each individual.
- Involving others will lead to increased leadership participation and greater awareness.
- Colleagues inviting colleagues to join the Torch Society ensures highly effective peer-to-peer influence.
- Team members should prepare for solicitation by personally making a leadership gift.

4. Determine Who to Solicit

- Develop an internal prospect list based on employee compensation, position in the company and/or United Way giving history.
- The table below recommends giving level based on salary range. You can use the table below as a guide to steer your internal goal setting and to develop your prospect list.

Compensation Ranges	Leadership Level	# of Employees	# of Givers	# of Prospects
\$50,000 - \$79,999	Bronze (\$1,000-\$1,499)			
\$80,000 - \$109,000	Copper (\$1,500-\$2,499)			
\$110,000 - \$149,000	Silver (\$2,500-\$4,999)			
\$150,000 - \$199,999	Gold (\$5,000-\$7,499)			
\$200,000 - \$249,999	Platinum (\$7,500-\$9,999)			
\$250,000 +	Tocqueville Society (\$10,000+)			

It is important to note that many individuals make contributions well above their suggested giving level.

- Solicit all past donors giving at the \$500 to \$999 level.
- Prepare and personalize each pledge card and all solicitation materials.
- Set a goal for the Leadership Giving Campaign
 - Include both dollars to raise and number of leadership givers
 - Announce leadership results as your campaign begins.

5. Assign Names to Team Members

- Select the **best** person(s) to extend the invitation
 - Because people give to people, assign a person who is perceived to be the one that the potential donor would most appreciate making the invitation
- Determine the perceived interest level of prospects
 - Is your potential donor “ready to give”, “requires further involvement” or “not very interested”?
- Rehearsal of the solicitation call is critical

6. Train Team Members on How to Ask

- The effective case for support is like an investment prospectus for a business. It is designed to attract volunteers and donors (investors).
- Potential Donors want to know:
 - What United Way has accomplished?
 - What United Way has the potential to do?
 - What benefits will result if they volunteer time and give money?
- From the viewpoint of the donor, United Way has no needs.
 - Santa Barbara County has problems to solve
 - People have needs and problems
 - United Way has solutions to problems, answers to questions and capabilities.
- Understand your prospects
 - Psychographics: what are their ideas, attitudes, interests and lifestyles?
 - Demographics: age, sex, income, residence, etc.
 - Capacity for Giving: what do they currently give, do they volunteer, what are their philanthropic tendencies?
- Focus your approach to address the goals and aspirations of your prospects group - and even individuals in that group
- People make significant gifts to United Way:
 - based on their ability to recognize that United Way mirrors their own deepest desires, values and aspirations
 - based on United Way's ability to demonstrate a capacity to solve the problems and address the opportunities that the potential donor himself considers most pressing.

7. Lay the Foundation for a Personalized Ask

- Hold a group meeting for identified prospects to present the benefits of the United Way and the Torch Society. The United Way can provide volunteer and/or agency speakers to enhance the CEO's presentation. Develop and publicize the Leadership Giving Campaign goal in addition to the overall campaign goal.
- Present the benefits of membership in the Torch Society. Through leadership gifts, individuals make a measurable difference in our community, set an example for others, and enjoy a range of other benefits.

Impact-Leadership giving plays a central role in enabling the United Way to make positive changes, create meaningful results and provide financial support for community solutions.

Personal Satisfaction- Leadership givers know their contribution helps provide positive solutions to the community's most pressing needs.

Leadership-Leadership giving programs bring together community champions that set a powerful example for others to follow.

Individual Recognition- Leadership givers are recognized for their contribution in a variety of ways including being eligible to be published in the widely distributed annual Leadership Giving directory.

Positive Company Image- The leadership giver's company is seen as a community leader because of the high level of commitment and philanthropy of its employees through leadership giving.

Network Development- Exclusive Torch Society events offer opportunities to expand business networks and meet like-minded philanthropic leaders.

Special Communications- As a key stakeholder, leadership givers are kept apprised of important issues facing our community and how United Way is working to bring about positive change.

"It's not very difficult to persuade people to do what they already long to do."- Aldous Huxley"

Sample Leadership Giving Meeting Agenda

Set Up: The intent of the meeting is made clear to all attendees in advance.

I. CEO welcome (5 minutes)

- Importance of leadership giving -- Why he/she gives
- % of leadership giving out of total campaign in company
- Why they are invited to this meeting
- A direct ask for leadership gifts - using own gift as an example
- Review agenda and the Leadership Giving Coordinator's responsibilities
- Thank You

II. Testimonial (5 minutes)

(an employee who is both a beneficiary of United Way services and a leadership giver is ideal)

- How United Way has touched his/her life
- Why United Way is important to the community
- Why he/she gives (at a leadership level if applicable)
- A direct ask for Leadership gifts from the attendees
- Thank You

III. United Way Representative (5 minutes)

- What is the Torch Society & the levels they can join
- What is the Young Leaders Society, The Women's Leadership Giving Initiative Society
- What is the Tocqueville Society
- Ways to give - Combined family gift options. Stock.
- Payroll deduction is a convenient and easy way to make a leadership gift
- Why United Way is the best way to help the most people
- Thank You

IV. Leadership Giving Coordinator (5 minutes)

- How gifts will be solicited
- Incentives/prizes
- Overall campaign timeline and goal
- The company will recognize and celebrate leadership givers
- See me with questions
- Thank you

Materials to have available: Personalized Pledge Cards, United Way Brochures, Leadership Giving directories, Tocqueville Society information.

8. Personally Visit and Invite

- Each Team member should meet with their assigned prospects to personally thank them for their past gift, invite them to make a new or increased gift, and answer any questions and reinforce the value of their contribution. During the visit, team members should:
 - Present the invitation quickly
 - Wait for an answer (clarify what is heard)
 - Do not engage objections. Move objections aside: "the reason I am here today is to invite your participation in the Torch Society..."
 - Clarify frequently
 - Test the ask as many times as you need to
 - Give the potential donor complete control and freedom
 - If the answer is a definite "no" and it has been tested, then the prospect should be thanked and the pledge card collected.
 - Clarify a "No" reply
 - If the answer is "maybe", be sure to leave with a follow up appointment scheduled

Ten Sample Invitations to be a Leadership Giver

- I'm here today to invite you into a partnership with the community and me by giving a Leadership Level gift to the United Way.
- Please consider partnering with the United Way to address our community's most pressing needs.
- Thank you for giving in the past. Will you and your spouse give again and increase your gift this year by 10% to help us meet growing needs in the areas of financial stability and education?
- We need a champion with our company at a leadership level. If you join as a Torch Society, Bronze level contributor, others will follow. Can we count on your gift?
- I am inviting you to join the many other community leaders in meeting the needs of NSB County.
- You are capable, as few are, of making a significant impact on the needs in NSB County. Please join me as a member of the Tocqueville Society.
- I know our community can count on your continued support this year. Will you make an increased gift over last year?
- Your leadership is very important to this company and your leadership giving is vital to the success of our campaign. We need your help in setting an example for your senior peers and for your employees to follow.
- Can our community count on your support at the Gold level this year?

9. Follow Up

- Follow up with all assigned colleagues until each pledge card is returned.
- Make it easy for people to give. Ask them if they have questions regarding United Way - Staff will be available to answer any questions you can not.
- Be positive that each prospect receives a clear and direct ask and that you receive an answer - yes or no.

10. Thank Everyone

- Send a thank you note to contributors and to members of your solicitation team.
- Send a note of thanks to all leadership contributors, signed by your CEO and/or your Leadership Giving Chair.
- Send a note of thanks to prospects who did not make a leadership gift. Thank them for their time and/or gift of a lesser amount. Remember that leadership campaigns are successful when they are built on a foundation of relationships.
- Host a reception to acknowledge and thank leadership donors.
- Additionally, United Way sends each leadership contributor a personal thank you and publishes names in a recognition roster.

11. Report Names and Final Results to United Way

- Notify United Way of proper spelling of names and correct giving information for each Leadership contributor. United Way will use your list as a check against pledge cards.

- United Way maintains a strict policy of confidentiality and only after donor approval, are leadership contributors listed in printed materials. All internal company lists and United Way donor information should be treated with the highest sensitivity throughout the campaign process.
- The United Way will combine gifts of couples from the same or different companies for Torch Club or Tocqueville Society recognition.

Levels of Leadership Giving

Tocqueville Society (\$10,000 +)

The Tocqueville Society was founded in 2011, The society is named for the 18th century French explorer, Alexis de Tocqueville, who wrote of the generosity of the American spirit in his work *Democracy in America*.

Currently there are local members of the Society. Tocqueville Society levels:

<i>Million Dollar Roundtable</i>	a gift of \$1 million (<i>can be paid over five-year period</i>)
<i>Ordre de Prospérité</i>	annual gift of \$750,000-\$999,999
<i>Ordre de Connaissance</i>	annual gift of \$500,000-\$749,999
<i>Ordre d' Indépendance</i>	annual gift of \$250,000-\$499,999
<i>La Société Nationale</i>	annual gift of \$100,000-\$249,999
<i>Ordre de Fraternité</i>	annual gift of \$75,000-\$99,999
<i>Ordre d' Egalité</i>	annual gift of \$50,000-\$74,999
<i>Ordre de Liberté</i>	annual gift of \$25,000-\$49,999
<i>Membres de la Société</i>	annual gift of \$10,000-\$24,999

Recognition: Name listed in national and local recognition materials (if permission is granted); Invitation to Tocqueville Society and Torch Society events. For more information, contact United Way at 805-922-0329 or email contact@uwcentralcoast.org

The Torch Society (\$1,000 to \$9,999)

United Way Torch Society was officially formed in 1998. Currently there are over 500 members.

Torch Society Giving Levels:

<i>Platinum</i>	\$7,500 - \$9,999
<i>Gold</i>	\$5,000 - \$7,499
<i>Silver</i>	\$2,500 - \$4,999
<i>Copper</i>	\$1,500 - \$2,499
<i>Bronze</i>	\$1,000 - \$1,499

Recognition: Name listed in annual leadership giving directory (if permission is granted); Invitation to Torch Society activities.

Other Leadership Benefits

- Increasing understanding of United Way's work on underlying community problems
- Building bridges between business and community leaders and minorities
- Increasing the number of minority leadership givers

Planned Giving

Present the additional option of planned giving to prospects. United Way is seeking to integrate planned giving into the annual campaign. A growing number of our donors are looking for alternative methods of giving. They are seeking opportunities to maximize their giving potential beyond the limits that the traditional United Way giving methods allow. Following are some of the ways United Way donors are leveraging their gifts.

▪ **Appreciated Securities:**

Giving appreciated securities offers you a two-fold tax savings:

- You avoid paying any capital gains tax on the increase in value of your securities.
- You receive a tax deduction for the full fair market value of the securities on the date of transfer to the United Way account. For income tax purposes, the value of such gifts may be deducted up to 30% of adjusted gross income, with an additional five-year carry forward.

Consider the following example:

You decide to make a \$10,000 charitable gift to the United Way to help the community. You usually make your gift by payroll deduction or check, but decide to see whether a gift of stock would be more fiscally beneficial.

You purchased 100 shares of XYZ Corporation in 1985 for \$2,000. Today the shares are worth \$10,000. An outright gift of the stock to United Way would result in a charitable contribution deduction of \$10,000. In addition, there is no tax on the \$8,000 of appreciation.

▪ **Gifts of Life Insurance**

- If you own a life insurance policy that is no longer needed, consider it as the perfect vehicle for a United Way contribution.
- To receive a charitable deduction, name the United Way as both the owner and the beneficiary of the policy. If the policy has a cash value, you can take a charitable deduction approximately equal to the cash value at the time of the gift. If annual premiums are still to be made and you continue to pay them, those premiums will become tax deductible each year.

- **Life Income Gifts** - Life income gifts allow you to transfer assets over to the United Way now, and continue to receive the income from the cash, stock or other property contributed. A life income gift can allow you to:
 - increase your income for life;
 - receive a generous charitable tax deduction in the year of the gift;
 - Complete avoidance or delay of capital gains tax on assets that have increased in value.
 - Life income gifts can be made through trust arrangements called *unitrusts or annuity trusts*.
A unitrust provides you with a fixed percentage of the fair market value of the assets in the trust. The income received will vary from year to year based upon how the trust's investments perform.

With an annuity trust, you receive a fixed amount from the trust. This amount is agreed upon when you create the trust; it remains constant, no matter what happens with the stock market or interest rates.

- **Charitable Gift Annuity** - In exchange for your irrevocable gift of cash, securities or other assets, United Way agrees to pay one or two annuitants a fixed sum each year for life. The older the designated annuitants are at the time of the gift, the greater the fixed sum.
- **Bequest:** The United Way can be named as a beneficiary in a will in a couple of simple ways.
 - An outright gift of funds or property could be specified.
 - The United Way could also be named as a remainder beneficiary to receive funds only after specific sums have been paid to individual beneficiaries.
 - In most cases you can easily add the United Way to your will through a simple amendment called a codicil.

***Your planned gift will need to be suited to your individual needs
in order to be the most beneficial.***

***Please check with your accountant, tax attorney or other tax advisor
for additional information on how these general rules apply to your situation.***



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