

Leadership Giving

Leading the Way:

Encouraging Personal Leadership Giving In Your Workplace Campaign

Coordinating and promoting Leadership Giving among your colleagues is the best way to increase the success of your organization's United Way 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

Meet with your CEO to request their personal involvement in the Leadership Giving campaign.

- CEO / Management endorsement is critical for a successful LG 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 (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

Recruit a small team to support the Leadership Giving campaign efforts.

- If your organization has more than 10 leadership contributors or prospects, one person may not be sufficient to adequately visit with each individual. Make certain that you have enough team members to meet with potential leadership donors one-on-one.
- 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 + | Alexis de 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. Schedule the Leadership Campaign

Schedule your organization's Leadership Giving campaign one or two weeks prior to the kick-off of your general campaign. By announcing the results early, Leadership Givers can set the tone for the rest of your employees, encouraging and inspiring others to give.

Determine the best way to "make the ask" in your organization:

- Host a Leadership Giving event in a special location such as a country club, hotel or unique location at your organization. Ask the CEO to endorse the campaign and ask an employee to give a testimonial. Invite a United Way presenter to speak about the impact of a Leadership gift. (See "Sample Leadership Giving Meeting Agenda" for more specific ideas for this type of event).
- Have a Leadership Giver within your organization, preferably the CEO or the Leadership Giving Coordinator, give brief presentations at existing meetings.
- Have a Leadership Giver(s) within your organization, preferably including the CEO or the Leadership Giving Coordinator visit with past Leadership Givers and Leadership Giving prospects one-on-one.
- Promote matching challenge grants from various foundations that maximize an individual leadership gift.

6. Making the Ask

The ask is the most important part of the Leadership Giving campaign

- Select the **best** person(s) within your organization to extend the invitation to become a Leadership Giver. 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.
- The Leadership Giving Chair or Leadership Team should meet with assigned donors and prospects to personally thank them for their past gift, invite them to make a new or increased gift, answer any questions and reinforce the value of their contribution.
- 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 of Summit County 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 of Summit County is working to bring about positive change.
- See "How to Ask For a Leadership Gift" for more specific ideas and techniques for "Making the Ask"

7. 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.

8. 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.

9. 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 Society or Tocqueville Society recognition.

