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Leadership Giving

Workplace Campaign Guide

Best practices for a successful campaign

What is Leadership Giving?

By donating \$1,200 or more per year, an individual is recognized through United Way's Leadership Giving Program. The Leadership Giving Program gives progressive, community-minded individuals the ability to be part of our city's complex social issues by enabling United Way to develop long-term, sustainable strategies.

Your Leadership is appreciated. Your gift is invested where it is needed most.

Levels of Leadership

Bronze \$1200—\$2499

Silver \$2400—\$4999

Gold \$5000—\$9999

Platinum \$10000—\$24999

Benefits of being a Leader:

- Make a meaningful and measureable difference in the community
- Considerable tax savings
- Obtain first-hand knowledge about community issues and the impact of donations
- Invitations to exclusive Leaders events
- Recognition in the annual Honour Roll

BENEFITS OF BEING A LEADER

Leadership donations help address our community's complex social issues in three key areas:

From poverty to possibility	Healthy people, strong communities	All that kids can be
<ul style="list-style-type: none"> • Moving people out of poverty • Meeting basic human needs (Ex. food, shelter, and jobs) 	<ul style="list-style-type: none"> • Improving access to social and health-related support services • Supporting resident and community engagement • Supporting community integration and settlement 	<ul style="list-style-type: none"> • Improving access to early childhood learning and development programs • Helping kids do well at school and complete high school • Making the healthy transition into adulthood and post-secondary education

In addition to knowing you are making a meaningful and measurable difference, Leaders also receive these benefits:

BRONZE LEADER \$1200 - \$2499	SILVER LEADER \$2500 - \$4999	GOLD LEADER \$5000 - \$9999	PLATINUM LEADER \$10,000 - \$24,999
<ul style="list-style-type: none"> • PERSONAL THANK YOU • TAX RECEIPT • HONOUR ROLL RECOGNITION • INVITATION TO LEADERS EVENTS 	<ul style="list-style-type: none"> • PERSONAL THANK YOU • TAX RECEIPT • HONOUR ROLL RECOGNITION • INVITATION TO LEADERS EVENTS 	<ul style="list-style-type: none"> • PERSONAL THANK YOU • TAX RECEIPT • HONOUR ROLL RECOGNITION • INVITATION TO LEADERS EVENTS • ANNUAL REPORT ON THE IMPACT OF YOUR GIFT 	<ul style="list-style-type: none"> • PERSONAL THANK YOU • TAX RECEIPT • HONOUR ROLL RECOGNITION • INVITATION TO LEADERS EVENTS • ANNUAL REPORT ON THE IMPACT OF YOUR GIFT • CUSTOMIZED LEADERSHIP RECOGNITION

Anyone
can be a
Leader!

YOUR ROLE IN THE CAMPAIGN AND WHY IT IS SO CRITICAL

Your role as a Leadership Campaign Chair within your workplace campaign is critical to the success of your campaign. As a Leadership Campaign Chair, your role is to:

- ✓ Help maintain the current base of Leadership givers
- ✓ Maximize the number of Leadership Donors in your workplace
- ✓ Help coordinate and focus a portion of your United Way campaign on existing Leaders, new and upcoming leaders
- ✓ Ensure United Way's Leadership Giving message is disseminated throughout your workplace
- ✓ Recruit, chair, and motivate a team of volunteers to help support the Leadership Giving campaign within your company
- ✓ Recognize and thank all Leadership Donors in your workplace
- ✓ Host and promote an event to spread awareness about the Leadership Giving Program

In order to identify and approach past and prospective Leadership donors, United Way will provide you with information from your organization's past campaigns.

In some organizations there may be many Leadership donors, and you may find it helpful to recruit a team of volunteers to approach and follow up specifically with all past and potential Leadership donors on a one-to-one basis. In other organizations there may only be a few (if any) Leadership donors and you may be able to contact them yourself.

Regardless of the size of your organization, consider recruiting support from all levels of the organization to maintain the peer to peer approach.

LEADERSHIP GIVING IN YOUR WORKPLACE

BEST PRACTICES FOR PLANNING YOUR CAMPAIGN

1. Review past leadership results and set a goal

Obtain list of previous Leadership donors from your designated United Way Campaign Manager. If your company does not wish to see this list, personalized mailings can be facilitated by United Way directly to ensure donor confidentiality. Clarify your company's policy around contacting Leaders and work with HR to ensure donor privacy.

Once your analysis has been completed, develop your goal. A goal motivates and provides a mechanism for measuring the success of your campaign. This could be to increase the number of Leadership donors, to increase the average gift of Leadership donors, or to increase the awareness of the Leadership Giving Program.

Develop your plan and goals in conjunction with the Employee Campaign Coordinator (ECC) for your company based on this information.

United Way staff can provide a wide range of campaign ideas for your company size and segment including what has worked well or not in the past.

Have any Leadership donors left the organization? Track these donors and report to United Way through a Leadership List. Check the list of 2012 Leadership Donors (people who gave \$1,000+) for your organization. Contact United Way for this list and confirm if the donors are still employed by your company.

*Leadership Giving starts at \$1,200 in 2013

*Must
Have*

2. Obtain support from your CEO or management team

This is vital to the success of the campaign. Management support allows staff and organizing committees the opportunity to highlight the importance of Leadership Giving.

Tip: There are many ways to show support from management, including inviting your CEO or Manager to speak at any Leadership events you have arranged in your organization.

*Must
Have*



3. Recruit a Solid Leadership Giving Team

Nice to Have

Start with a Leadership Giving Chair who will work in partnership with the ECC and United Way. Consider choosing someone who is a leader in your organization. Many companies will have a member of the executive team in this role. This allows for a direct line to the President/CEO for additional support. However, someone outside of the management team can be extremely effective in this role as well. They are able to challenge perceptions and lead by example.

Many hands make light work. Representation from across your organization ensures all voices are heard. Recruit team members from all levels to maintain a peer-to-peer approach and who will help develop and deliver any Leader specific events, speakers and canvassing.



4. Create Canvassing Strategies

Plan on a one-to-one personal approach and follow-up with all Leadership donors. People give to people. The number one reason people don't give is because they were not asked. Canvassers are your most valuable resource since a peer-to-peer approach is the most effective method of fundraising. United Way staff can facilitate a training session to equip your canvassers with the necessary information to succeed in their role.

Include All Staff in Leadership messaging. One of the myths of Leadership Giving is that only the highest earners in a company are able to become a Leader. Some of the most successful Leadership Campaigns include messages to all staff about Leadership Giving. Testimonials from employees outside of management on why they are a Leader can be effective ways of demonstrating the ease of giving at this level.

Nice to Have

Make the Ask. Select the best person(s) within your organization to extend the invitation to become a Leadership donor. Because people give to people, assign a person who is perceived to be the one that the potential donor would most appreciate receiving an ask from.

The Leadership Giving Chair or 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. A sample letter is also available to facilitate this process.

5. Personalize all Past Leadership Donors Employee Pledge Packages

Nice to Have

It's harder to ignore something with your name on it. United Way can provide you with pre-printed pledge cards.

Tip: Include specific Leadership materials in the pledge packages for previous Leaders. You can also prospect potential Leaders by giving Leadership collateral to employees donating \$500-\$1199.

**Must
Have**

6. Provide information on how to give

There are a number of ways that your workplace can facilitate employee giving. If your workplace uses e-Pledge or UnitedWay@Work, consider using customized messaging for existing Leadership donors to thank and encourage them to return or increase their gift.

Methods of giving:

- Payroll deduction
- Cash, cheque or pre-authorized payments by credit card
- Online
- Gift of Securities

Tip: Include customized messaging to previous Leadership donors

7. Schedule a Leadership Event/Talk

**Nice to
Have**

Consider hosting a special event for Leadership Donors to educate, engage and recognize them. In building your Leadership Giving strategies you may want to host a Leaders specific event to recognize past donors and encourage them to return at the Leadership Giving Level.

Some examples might be a Leadership Breakfast or Lunch, a speaker, an agency tour, a walking tour, a Leaders Day of Caring®, or a Lunch & Learn for your employee group to create awareness among all staff and demonstrate the impact of their Leadership gifts, Events: Wine & Cheese Reception, Leaders Appreciation Breakfast, Leaders Lunch & Learn,

United Way can help you customize an activity to suit your time constraints, company culture, and interests of participants. Don't forget all sites and shifts. United Way Leaders Cabinet volunteers from several different companies are trained each year to go out and speak at your organizations. They can speak specifically to the Leadership Giving Program and its benefits. Contact your United Way representative to book a speaker for your group.

It may also be useful to ask Leadership Donors to bring a friend to a Leaders event to expand your prospect pool.

Consider having your executive sponsor or Leaders Champion send out the invitations.

**HIGHLY
RECOMMENDED**

Nice to
Have

8. Host a Mid-Campaign Meeting

This should be scheduled with your Employee Campaign Coordinator and United Way to ensure everything is on track. This will allow you to assess your campaign progress to date and to implement strategies to ensure success. Follow up with all assigned canvassers and members of the Leadership Giving team to track pledging and collection of any outstanding pledge forms.

Ensure that each identified prospect receives a clear and direct ask and that you receive an answer - yes or no.



9. Thank all donors and volunteers

Must
Have

Evaluate & pat yourself on the back for a job well done! Conduct a debrief session in conjunction with your Employee Campaign Coordinator and/or United Way Campaign manager and Campaign Representative.

Invite United Way to report back to staff on the impact of their Leadership gifts. A presentation or agency tour in the months immediately following your campaign will reinforce the value of donors' gifts and make your job easier next year.

Tip: Include a unique, personalized thank-you for Leaders with your company's messaging.

10. Celebrate Successes and Recognize Your Team for Their Efforts!

Whether it's through a nomination for an Award or an all-staff message from the President or Leadership Champion, allow the company to see the growth and successes of the Leadership Giving program. Ultimately, the best recognition is *knowing* your investment has helped to release the potential in our children, families, neighbors and communities.

Nice to
Have

RESOURCES

When building your messaging and internal Leadership Giving strategies, consider using some of the Leadership specific printed or electronic material available from your United Way .



Leadership Giving Brochure

Brochure outlining the benefits and components of the Leadership Giving Program. This is great for employees who may be new to United Way and the Leadership Giving Program.



Leadership Giving Insert

A compressed version of the brochure. It includes all the pertinent information in a smaller format. Great for using as a desk-drop or distributing at events.



Leadership Giving Pledge Form

These pledge forms can be customized to include the name of past Leadership Donors or current prospects. Add a personal touch to make a more personal ask.



Sample Leadership Giving Solicitation Letter

This letter can be tailored and sent from your Leaders Champion, President or CEO. It is a great way to encourage Leadership Giving in your organization.



Sample Leadership Giving Thank You Letter

Always thank your Leadership Donors. A letter from management or executive may be a good way to do this.



Honour Roll

The Honour Roll is available for employees to peruse and is a great way to reference the recognition given to individuals who join the Leadership Giving Program.

Thank you for the important work you are doing as a Leadership Giving volunteer. United Way is here to support your efforts in making this a great community for everyone.

UW LOGO & CONTACT

INFORMATION HERE