

## **How to Build a Successful United Way Leadership Giving Program in Your Workplace**

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### **1. Obtain support from your CEO and senior management team.**

- Meet with your CEO to request their support and personal involvement in the Leadership Giving campaign. Their support is critical for a successful Leadership Giving campaign.
- Has your CEO already made a personal Leadership Giving (\$1,000 +) donation? If not, work with United Way staff to identify the best person to ask your CEO for a Leadership gift.
- Encourage the establishment of a Leadership Giving “club” within your company to enhance company participation and recognition.

### **2. Recruit a Leadership Giving Coordinator to organize your Leadership Campaign.**

- Work with your CEO to select the best possible person for this role. This individual needs the following characteristics:
  - Well respected by his/her peers.
  - Personable, highly organized, a team player, and a leader.
  - The Leadership Giving Coordinator must be a leadership giver.
- The Leadership Giving Coordinator should work closely with the Company Campaign Coordinator to ensure optimum results.

### **3. Develop a detailed Leadership Giving program and timeline.**

- Leadership Giving has a separate kick-off event at all locations before the kick-off of the general campaign. By announcing the results of an early Leadership Giving Campaign, Leadership Givers can set the tone for the rest of the campaign, encouraging and inspiring others to give. Also, consider sending these results to your United Way staff contact early so United Way can thank these donors in a timely manner.
- Set Leadership Giving Program donation goals.
  - Based on research about Leadership Giving potential in the company, the Leadership Giving Coordinator, the Company Campaign Coordinator, and United Way staff work together to ensure that the Leadership Giving total dollar or total member goals are realistic and attainable.
- Market Leadership Giving and maintain communication with donors and potential donors
  - Distribute information on how your United Way works and be prepared to answer questions about how it works.
  - Develop guidelines for meeting with potential donors that tell peer volunteers what to say to potential donors.
  - Send each potential donor a personalized pledge card.

#### **4. Identify potential donors and potential giving levels for each of them.**

- Work with your local United Way representative to set criteria for potential Leadership Giving donors.
  - Leadership giving prospects typically have an annual household income of \$100,000+.
  - Check previous donation records for people who have in the past or are currently contributing at the Leadership Giving Level. If any of those individuals have left the company, please let your United Way staff know so they can follow up with those donors directly.
  - Be sure to include people who are already close to the leadership giving level (\$500-\$999).
- Include company retirees as part of the potential Leadership Giving pool.
- The Leadership Giving Coordinator and the Company Campaign Coordinator can decide on the appropriate amount of each donation request. Local United Way staff can provide you with guidelines for donation amounts based on compensation.
- Assess how many peer to peer volunteers are needed based on the number of potential donors.

#### **5. Recruit additional peer volunteers if needed.**

- If your organization has more than 10 leadership contributors or prospects, one person may not be sufficient to visit with each individual.
- Each peer volunteer should be a Leadership Giving donor.
- Train peer volunteers (with help from your local United Way).
  - The ability to explain how Leadership Giving supports the company's charitable giving goals is one of the tools that can be used for effective peer-to-peer solicitation. Include this information as part of the training that peer volunteers receive.
- Explain the company Leadership Giving Program to all volunteers.
- Your group of potential contributors can include individuals other than management. Recruit appropriate peer-level volunteers to work with them.

#### **6. Kick-off the Leadership Giving Program.**

- Design your kick-off event to match your corporate culture. For example, a casual breakfast may work in one company, while a formal cocktail party may work in another.
- Plan the kick off event to ensure that the maximum number of potential donors, along with key upper management staff, can attend. You may consider holding the meeting during an already scheduled managers/directors meeting.
- All members of the Leadership Giving Program team attend the kick-off event.
- Invite current leadership donors as well as prospects using a letter of endorsement from the CEO.

- Invite a United Way staff person or a key United Way volunteer who knows about Leadership Giving to participate in the program.
- The program provides donors and potential donors information on the following:
  - A video on United Way.
  - How Leadership Giving works and who is participating now.
    - Distribute a list of community and company leaders who are current Leadership Giving donors.
    - Invite active Leadership Giving donors to talk about their positive experiences as donors.
  - Overall Employee Campaign and how Leadership Giving fits in.
    - Include overall Leadership Giving donation dollar goals.
  - The role of peer volunteers
  - Thank participants for attending the kick-off and for their past and future participation.
- If your company has branch locations, stage a kick-off at each branch.
  - Develop innovative ways to adapt the program to each branch, such as using branch success stories and its history as part of the program.
  - Make sure all location managers, key staff, and Leadership Giving volunteers at each location participate.

#### **7. Begin peer visits. Making the ask.**

- Select the best person within the company 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 making the invitation.
- Peer volunteers approach individuals on their potential donor list in person to 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.
- Peer volunteers distribute a personalized gift card to each donor.
  - If the individual is prepared to make a donation or pledge at the initial meeting, the peer volunteer should accept the donation.
    - The volunteer makes sure that the donor completes and delivers the membership/pledge card with the donation.
    - Direct donations are immediately given to the company representative responsible for processing pledges.
  - If the potential donor wants to think about making a donation, the peer volunteer leaves the gift card with the person.
    - The volunteer notes that the person has not yet made a donation so that proper follow-up can be done.

#### **8. Follow-up on results.**

- The Leadership Giving Coordinator should follow-up with the peer volunteers to ensure that potential donors are contacted as planned.

- Follow up with all assigned colleagues until each pledge card is returned.
  - Set a time frame for follow-up contacts. Be sure to ensure that contacts are spaced so those potential donors do not feel that they are being “harassed” for donations.
- Allow time for answering any questions that either peer volunteers or their prospects may have. United Way staff will be able to answer any questions the peer volunteers can not.
- Be positive that each prospect receives a clear and direct ask and that the peer volunteer receives an answer – yes or no.
- Make sure you share these results with the Company Campaign Coordinator.

### **9. Say “Thank You.”**

- Send a personalized letter from your company’s CEO and Leadership Giving Coordinator thanking each leadership donor.
- Send a thank you letter to any peer volunteers who may have helped solicit leadership donors.
- Plan for a special event (such as a reception, lunch, dinner, or party) hosted by your company CEO to thank Leadership Giving donors and peer volunteers for their support and commitment.
- Recognize all leadership givers in a visible way that will encourage other employees to give.
- Consider giving each Leadership Giving donor a token of appreciation.
  - The token need not be expensive, but should be meaningful, such as a lapel pin or desk ornament bearing a customized symbol that has real meaning in the community or company.
- Acknowledge donors throughout the year, not just once.
  - Plan events exclusively for leadership donors like a breakfast or lunch where a United Way representative can update them on the impact their gifts are having in the community or a special visit to tour a United Way agency.
  - Show respect for your donors’ degree of commitment by informing them of volunteer opportunities in the community that will extend their gifts, raise their recognition on the community, and foster the company’s image as a good citizen in the community.

### **10. Report Your Success**

- Tell the company leaders and employees.
  - Provide a copy of donor gift cards (along with any donations receive) to the individual charged with maintaining campaign records. If the donor wants to use payroll deduction to meet his/her pledge, be sure that the person’s payroll records are updated to reflect the deduction.
  - Statistics on donations received, lists of donor names and donation amounts, and a summary of the Leadership Giving Program effort are part of any regular reporting done by the Company Campaign Coordinator to upper management.

- Tell your local United Way
  - Provide United Way with the names, home addresses, and donation amounts of your Leadership Giving donors, so that United Way can acknowledge their donations, thank them for their generosity and commitment, and provide them with appropriate tax records.
    - Providing names makes it possible for United Way to send updates on how donor gifts are affecting the community.
    - Providing home addresses allows donors to include their life partners in their philanthropy and also allows United Way to engage with these Leadership Donors by inviting them to community-wide Leadership Giving events.
    - Providing contribution amounts gives donors the opportunity to be recognized at the appropriate levels of leadership participation in the community and, if they wish, to be included in their local United Way Leadership Giving donor membership roster at the appropriate levels.