



The BEST Way to Help the MOST People

How to Conduct a Successful Leadership Giving Campaign

Conducting a **Leadership Giving** campaign is **one of the best ways** to increase the success of your organization's overall United Way campaign. As an integral part of your workplace giving program, **Leadership Giving allows your employees to make a greater impact** on the lives of people throughout Troutman, Statesville and northern Iredell County and **sets your organization apart as a leader in our community.**

To Implement Your Leadership Giving Campaign

- Hold **separate Leadership Giving meetings** in addition to general employee meetings and/or
- **Integrate Leadership Giving into all United Way employee meetings**

We encourage you to work with United Way Resource Development Director Debbie Howell or our Executive Director Pat Stewart to help you determine the best strategy for your organization.

Gain CEO and Senior Management Support

- **Meet with your CEO/management staff** to make sure they understand and support United Way and Leadership Giving.
- **Ask the CEO to appoint a well-respected member of your organization** already giving at the Leadership level to spearhead the Leadership Giving campaign.
- Work with your **United Way representative** to identify the best person to **ask your CEO for a Leadership or Tocqueville gift.**

- **Recruit a Team to Assist the Leadership Giving Chair**
- Recruit a team of current Leadership Donors to assist the Leadership Giving Chair.
- Make solicitations in person. **Peer-to-peer solicitations are the most effective "Asks."**
- Your Leadership Giving team can **solicit incentives** from the CEO/management team and/or local businesses.

Develop a Plan & Timeline for your Leadership Giving Campaign

- If you're holding separate Leadership meetings, schedule your organization's **Leadership Giving campaign the week prior to the kick-off of your general campaign.**
- By **announcing the results of an early Leadership Campaign**, Leadership Donors can set the tone for the rest of the campaign, encouraging and inspiring others to give.
- **Set goals for Leadership Giving and Alexis de Tocqueville Giving**
- Include current and potential Leadership Donors in **ask+meetings.**
- **Potential Leadership donors** are current donors who give who already give generously and would **consider increasing their gift to \$750 or more.**
- **Include retirees and/or Board Members** as part of the potential Leadership pool.
- **Invite employees with a letter of endorsement from the CEO or Leadership Giving Chair.**

Schedule a United Way Leadership Giving Meeting

- Consider holding your meeting **during an already scheduled managers/directors meeting prior to the employee campaign.**
- Work with your United Way representative to **schedule a speaker** for your meeting.
Someone might be:
- A Leadership Speaker and **United Way champion** (ask United Way.)
- A United Way Partner **Agency speaker**
- An **employee from your organization** who is a Leadership donor or United Way service recipient
- **Ask your CEO to make his/her donation prior to the meeting** and endorse the Leadership Giving Campaign at the meeting.
- **Have handouts available** including the Leadership Giving Brochure and pledge forms.
- **Promote** interest and **confirm** attendance of invitees.
- Use incentives to **encourage attendance.**

Sample Leadership Giving Meeting Agenda

- CEO endorses Leadership Giving
- **Present the benefits of Leadership Giving** . pride, personal reward, membership in the United Way Benefactors Club and being invited to the United Way Leadership Giving Reception.
- Employee/agency speaker shares story
- United Way representative speaks
- **Show the NEW!! 5 Minute 2009 local United Way video (done by high school students at the Early College at Mitchell Community College**
- Distribute personalized pledge cards and pens and support materials (brochure, etc)
- Encourage gifts of stock
- **Highlight United Way's Financial Stability/Helping the Working Poor Tax Credit**
- Explain incentives (if available)
- Make %the Ask+
- Thank everyone for attending and for their support after the meeting
- Collect all pledge forms
- Personally contact anyone who did not attend the meeting and make %the Ask.+

Include Leadership Giving in all United Way Employee Meetings

- Discuss Leadership Giving and its benefits in all employee meetings and invite employees to join.
- Do not assume that employees cannot give at the Leadership levels. It is a personal choice and many companies report to us that %front line+employees often account for a significant amount of Leadership Donors.

Thank all Leadership Donors

- **Send a personal thank you from the CEO and Leadership Chair** to all Leadership Giving donors.
- Consider holding a **thank you event** hosted by the CEO and distribute incentives.
- **Recognize all Leadership Donors in a visible way** that will encourage other employees to give (e.g. Leadership Giving shirts, plaques, certificates (ask United Way.)
- **Advise Leadership Donors to expect a "Thank you" letter and membership certificate from United Way of Iredell County.**