

Leading the Way

Encouraging Leadership Giving



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. A Leadership gift is any gift of \$1,000 or more to the Community Fund. Alexis de Tocqueville Society is comprised of United Way contributors who donate \$10,000 or more to the Community Fund

1. Obtain the support of your CEO

- 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 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 Club 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.

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 of Dutchess County has accomplished?

... What United Way of Dutchess County has the potential to do?

... What benefits will result if they volunteer time and give money?

- From the viewpoint of the donor, United Way of Dutchess County has no needs.

- Dutchess 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 of Dutchess County:
... based on their ability to recognize that United Way mirrors their own deepest desires, values and aspirations
- ... based on United Way of Dutchess County'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 Leadership giving.. 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.

"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.

1. 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
2. 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
3. United Way Representative (5 minutes)
 - What are the leadership giving levels
 - What are leadership affinity groups
 - What is the Alexis de 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

4. 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, Alexis de Tocqueville 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 as a Leadership Giver...”
- 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 of Dutchess County.

- 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 Dutchess County’s growing needs.

- We need a champion with our company at a leadership level. If you join as a Leadership Giver, 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 Dutchess County.
- You are capable, as few are, of making a significant impact on the needs in Dutchess County. Please join me as a member of the Alexis de 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.

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 Leadership or Alexis de Tocqueville Society recognition.