

Leadership Starts Here...

The Impact of 13% More



United Way

Kitchener Waterloo & Area

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Change starts here.

Conduct a **Successful** Leadership Campaign

Leadership donors contribute \$1,000 or more. Conducting a Leadership Giving campaign is one of the best ways to increase the success of your organization's overall United Way KW campaign. As an integral part of your workforce giving program, Leadership Giving allows your employees to make a greater impact on the lives of people and sets your organization apart as a leader in our community.

8 Steps to Building a Successful Leadership Giving Program

Statistics show that if you follow these "best practices," you can increase your organization's campaign by 16% or more- and we're looking for 13%!

1. Obtain the support of the CEO and Senior Management.

- Meet with them to ensure that they understand and support leadership giving and are willing to support a separate, targeted meeting
- Has your CEO already made a personal Leadership gift? If not, identify the best person to ask your CEO for a Leadership gift. Ensure they are asked!
- Ensure it is "leader led"; Ask CEO to appoint an internal Leadership Campaign chair- a well-respected member of your organization already giving at the Leadership level -to work with the Employee Campaign Coordinator/Chair.
- Encourage ways to enhance participation and recognition. Ex: The CEO holds a luncheon or dinner to recognize these donors.
- Encourage an organizational "match" to employee donations.

2. Recruit a Leadership Campaign team to help with your efforts.

- Leadership giving initiatives at their best are based on peer-to-peer contact, which fosters respect for and participation in the effort.
- Involve numerous executives would be an asset to the solicitation process
- Recruit a team to assist. These are your Leadership Ambassadors. If people don't know about the initiative, they won't participate and the more voices the better.
- One person may not be enough to visit with each member or prospective member. Assess how many peer-to-peer volunteers are needed based on the number of potential donors. Solicitations in person are the most effective.
- Arrange for the Ambassador(s) to discuss with United Way KW staff how the organization's giving values and goals align with United Way KW's. They can help show that alignment. The ability to show this alignment is one of the tools that can be used for effective peer-to-peer solicitation.
- Involving others will lead to increased and improved leadership participation.

3. Develop a detailed Leadership Campaign Plan.

- Establish the timing of the Leadership Campaign in the larger context of the United Way KW campaign.
- Set Leadership Campaign donation goals. Consider having your CEO challenge the organization to set an example for the community by saying that “your” minimum donation to be a leader is \$1100, or...
- Looking for ideas and another perspective? Contact a member of our United Way KW Leadership Cabinet.
- Leadership Giving should have a separate kick-off event before the kick-off of the general campaign- typically one to two weeks ahead. This event should recognize those from the prior year and recruit for this year. So invite prospects as well.
- By announcing the results of an early Leadership Campaign, Leadership Givers can set the tone for the rest of the campaign, encouraging and inspiring others to give.
- Market Leadership giving and maintain communication with donors and potential donors.
- Include retirees and/or Board Members as part of the potential Leadership pool.
- Invite employees with a letter of endorsement or a pre-recorded voicemail from the CEO and/or Leadership Campaign Chair.

4. Coordinate leadership giving efforts within the overall company campaign plan.

- Identify potential Leadership donors. Typically, these are donors who make an annual salary of \$50,000 minimum – but everyone should have the opportunity to be asked! Remember that donations are experience driven, not \$ driven.
- Mirror United Way messages and create themes for campaign.
- Incorporate activities that are already going on with special “perks” for Leadership donors. Ex: Have a separate drawing for just Leadership donors; Have a prize for the Leadership donor that increases his/her gift the most that year.
- Determine how much each person should be asked to contribute. Your CEO might be asked to consider a gift of \$5,000, while your Senior Managers might be asked to consider donations of \$2,500.
- Check past donation records for people who have or are already contributing at the Leadership level. Make sure that these people are only invited to the separate Leadership solicitation.

For a mere \$2.74 a day, anyone at your company can donate at the leadership level. Help break it down for your employees by comparing what \$2.74 buys today. That's about the cost of a specialty coffee at Starbucks!

- Highlight Leadership giving in all overall company campaign meetings.
- Discuss Leadership giving and its benefits in all employee meetings and invite employees to join.

5. Conduct a launch event and/or a solicitation meeting for the Leadership Campaign.

- Design an event to match your corporate culture. For example, a casual breakfast may work in one company, while a formal luncheon may work in another.
- Tie the leadership message to your strategic priorities.
- Invite a United Way KW representative and/or a key United Way KW volunteer to participate in the initiative. Your United Way KW representative may be able to arrange for appropriate person.
- Provide an opportunity for individuals to make their donation at the event with the distribution of personalized Leadership donation forms; if not asked during the event, begin peer to peer in person visits to follow up
- Set a target date for completing the visits and make sure that each peer volunteer knows that date.
- Peer volunteers approach individuals on their potential donor list in person and request that he/she make a contribution. If the individual donated at the meeting, this visit becomes an opportunity to say thank you.
- This is the perfect place to launch a matching program showing the multiplier effect of a match.

Meeting ideas:

- Consider holding your meeting during an already scheduled managers/directors meeting prior to the campaign.
- Consider having an employee from your organization speak who is a Leadership donor or a recipient of support services- why do they give?
- Ask CEO to make his/her donation prior to the meeting & endorse the LEADERSHIP GIVING campaign at the meeting.
- Have handouts including the campaign materials and donation forms.
- Use incentives to encourage attendance such as; draws, gift certificates, etc.

Sample Meeting Agenda

- CEO welcomes and endorses Leadership Campaign.
- Have those around the table who have given before share why they give (ask them permission to do so ahead of time).
- United Way KW representative may speak.
- Make "The Ask" (prepare your personal 30 second reason).
- Distribute forms and materials.
- Encourage gifts of stock, if appropriate.
- Thank everyone for attending and for their support.
- Collect all Leadership donation forms.

After the Meeting

- Personally contact anyone who did not attend the meeting and make "The Ask".
- Personally thank everyone who gave at the leadership level".



6. Ensure to recognize your Leadership Campaign team along the way.

- Profile who is on the team.
- Visibly thank the individuals on the team at any opportunity you can.
- Email the individual team member's manager to thank them for supporting their involvement.
- Send hand written notes when you've seen them get some leadership donors.
- Publically thank the team members at the overall campaign completion.
- Include draws, goal, and awards within this team.

7. Say "Thank You" to all the leadership donors.

- Plan a thank-you event for leadership donors such as a reception or lunch hosted by the CEO. Often, an event at your company draws attention and causes other donors to ask what the event is for. This causes donors to make a leadership gift the next year – everyone wants to be part of something exclusive!
- Personally call on each of your leadership donors to thank them for their support and commitment. This list may be divided between the Employee Campaign Chair and the Leadership Campaign chair.
- Have a personal letter sent from your CEO, thanking each donor and Ambassador
- Communicate to Leadership donors year round; mid year event with a report back from United Way KW may be arranged.
- Promote and encourage donors to attend United Way KW Leadership event.

8. Report Your Success

- Report your success –to your team, to your CEO, to United Way KW and to your organization's employees.
- Publicly display a list of your Leadership donors, if appropriate to your company culture.



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