

## Leadership Giving

---

Across the country, leadership giving is the fastest growing segment of most company workplace campaigns. Recent surveys suggest companies that have a leadership giving program in place experience, on average 20 percent higher employee per capita giving than companies not using this technique. In the 2007 campaign, leadership giving at United Way of the Big Bend represented more than 33 percent of total campaign contributions. In order for United Way to grow and continue to have an impact on this community, the number of Leadership Givers in the employee campaigns must continue to increase.

### Benefits of Leadership Giving

#### Community Benefits

- Access to new resources - New dollars from leadership giving donations enhance the ability of United Way to efficiently respond to emerging community needs.
- Recognition of new community leaders - Leadership donors and volunteers gain recognition for their charitable activities and are acknowledged as community leaders.
- Increased community spirit - Leadership donors have increased pride in the community and desire to participate in community activities.

#### Donor Benefits

- Community awareness - A formal leadership giving program incorporates better communication and increases understanding and awareness of community needs.
- Positive image - Leadership donors are perceived as positive role models for their peers who may increase the level of participation and total dollars raised throughout the community.
- Personal satisfaction - Leadership donors lead the way towards making a difference in the lives of many people each and every day.

#### Company Benefits

- Positive image - Demonstrates a company-wide commitment to improving lives in our community.
- Employee performance - Leadership giving activities encourage teamwork and enhance relationships by connecting employees with a vision and passion.
- More resources - A company's overall United Way campaign increases which results in additional community resources that are available to help more people.



**Leadership Giving is the opportunity for contributors to maximize their gifts' impact on this community.**

**Contributions at leadership levels will go a long way toward making permanent and sustained changes in people's lives.**

**United Way *Tocqueville Society***

The Tocqueville Society is a national association of major donors who support health and human service programs through United Way. There are 411 Societies throughout the country which raised over \$500 million from more than 26,000 individuals nationwide last year. During the 2007 United Way Campaign, 43 devoted members of UWBB's Tocqueville Society raised more than 449,000.

The Tocqueville Society was inspired by the observations of the French historian Alexis de Tocqueville, who wrote about Americans' unique spirit of philanthropic association and voluntary effort for the common good. This spirit lives at the very heart of United Way.

**United Way *Community Society***

United Way acknowledges that there are individuals in the Big Bend who are prepared to move to a major gift level. By establishing the Community Society, we are able to recognize these extraordinarily generous contributors to our community.

**Leadership Giving Levels**

<b>Azalea Circle</b>	<b>\$1,000-1,999</b>
Dogwood Circle	\$2,000-2,999
Magnolia Circle	\$3,000-3,999
Live Oak Circle	\$4,000-4,999
Community Society	\$5,000-9,999
Tocqueville Society	\$10,000 and above

**Did you know...**

A gift to the Community Care Fund can yield tremendous improvement in our community.

**A \$1,000 gift provides one of the following services:**

- Prescription medications for a Hospice House patient for one month
- One full week of Asthma Summer Camp for two children
- Dinner at The Homeless Coalition for one week

**A \$5,000 gift provides one of the following services:**

- Early Head Start one-year scholarship for two low-income families
- Five months of shelter housing for one homeless pregnant woman
- Electric utilities assistance for 17 families

**A \$10,000 gift provides one of the following services:**

- Meals at the teen homeless shelter for four months
- One year of living assistance for two low-income elders, three times per week
- Equip and pre-positioning of one shelter support trailer for hurricane evacuees

# Leadership Giving

You've already learned that one of the important parts of a successful campaign is conducting a leadership event. By running your leadership campaign one to two weeks prior to your general campaign, your leadership donors set the pace for others to follow.

## CONDUCTING A LEADERSHIP CAMPAIGN IS EASY!

*Recruit • Organize • Target • Host • Thank*

### 1. Recruit Leadership Coordinator & Team:

- Recruit a respected senior staff member and current leadership giver to act as a leadership coordinator and conduct the Leadership Giving Campaign.
- The leadership coordinator should work closely with the employee campaign coordinator to ensure optimum results.
- Depending on the size of your company, consider recruiting additional individuals to help by asking your senior staff member or the CEO to help determine the best candidate/s.
- Involving others will lead to increased participation and awareness.

### 2. Plan Your Leadership Giving Program:

- Establish the timing of the Leadership Giving Campaign.
- Review last year's efforts and results.
- Set a realistic and attainable goal for new leadership gifts and total leadership giving.

### 3. Create a Prospect List:

- Work with your UWBB representative to set criteria for soliciting potential leadership donors. Consider:
  - Employees who gave at leadership levels last year.
  - Current donors of \$500 or more.
  - Employees who hold senior management positions.
  - Employees receiving stock or stock options as part of their compensation package.
  - Employees who express interest and have potential to give at the leadership level.
  - Retirees who were past donors; invite them to continue leadership roles.

### 4. Communicate:

- Develop and publicize the company goal for leadership giving in addition to the overall campaign.
- Invite prospects to a special breakfast, luncheon, or reception to present benefits of leadership giving. See "Leadership Giving Presentation: Sample Agenda."
- Distribute brochures, pledge cards and other appropriate information. When possible, personalize the materials with the individual's name.

## 5. Thank Your Contributors:

- Send a thank you note to contributors and members of your team.
- Suggest that your CEO host a reception to acknowledge and thank leadership contributors.
- UWBB also sends each leadership contributor a personal thank you.
- Encourage leadership donors to attend United Way's Annual Leadership event.

## Leadership Giving Presentation: Sample Agenda

### Part I: CEO/ Senior Staff/Leadership Campaign Chair (Approximately 5-7 minutes)

- Welcome
- Explain why attendees were invited to the meeting
- Explanation of company's responsibility to the community
- Personal endorsement of United Way
- Review Agenda

### Part II: Employee Testimonial

Employee who is a current leadership giver & beneficiary of services is ideal; if no employee is available to speak, the campaign video provides a powerful testimonial.

- How United Way touched his/her life
- Why United Way is important to the community
- Why he/she gives

### Part III: United Way Volunteer (Approximately 6-8 minutes)

- Update on United Way
- Explain levels and payment options for leadership gifts
- A specific request that meeting attendees consider a pledge at leadership levels

### Part V: Company Representative/CEO (Approximately 2-3 minutes)

- An announcement that the corporate gift and the CEO's gift have been made
- Campaign timeline, other information
- Offer to address questions, comments, etc.
- Thank colleagues for their attention
- Make a direct ask for leadership gift

### Helpful Hint

UWBB holds an annual Leadership Giving Celebration in the spring to honor the individuals and/or couples who contribute so generously to our community.

Promoting this event can serve as one way to thank your leadership donors

### Helpful Hint

Utilize United Way's Speakers Bureau and enlist one of our advocates to come and speak to your group.

Advocates include the current Campaign Chair, various community leaders, UWBB's President, agency staff members, or loaned executives.

For a list of names, ideas, and to schedule a speaker for an event, please contact your UWBB Campaign Manager.